OPENTEXT™

# OpenText™ Vendor Portal

# User Guide

*This guide describes how suppliers use the Vendor Portal web application to view and work with business documents and settings in their trading communities.*

April 2017

OpenText™ Vendor Portal
User Guide
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**This documentation has been created for software version 16.3.4.**

It is also valid for subsequent software versions as long as no new document version is shipped with the product or is published at https://knowledge.opentext.com.

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# Contents

# Introduction

This guide describes how to work with OpenText™ Vendor Portal, a hosted Web application that enables vendor companies to manage electronic document exchange with their trading partners.

The Introduction is organized as follows:



## Audience

This guide is written for administrators and users who have responsibilities related to business document exchange between your company and a trading partner.

## Product Support and Assistance

If an OpenText business partner provides support for Vendor Portal, contact that business partner directly.

If OpenText provides support:

- You can log a problem ticket on the Cloud Support Services (CSS) website: http://customer.gxs.com. Under Self Service, click **Submit a Service Request**, then fill out the online form.
- To download the latest documentation, at the website above click the **Knowledge Base** link, then click the **Vendor Portal** link. Documentation links display on the right.

- Contact CSS at the following phone numbers 24 hours a day, 7 days a week.

| Geographic Location | Type of Service | Call |
|---|---|---|
| US | Support | 1.877.446.6847 option 1 |
| | Implementation & Compliance Services | 1.877.446.6847 option 2 |
| | Educational Services | 1.877.446.6847 option 3 |
| | Sales or Professional Services | 1.877.446.6847 option 4 |
| | Billing Questions | 1.877.446.6847 option 5 |
| | Payments | 1.877.446.6847 option 6 |
| EMEA | Support | +44 (0)1483 569388<br>For out of hours support call +1 404.467.3806 |
| ASPAC | Support | |
| | Hong Kong | +852-22332111 |
| | China (PRC): | |
| | ■ China Netcom users | 10800 8521694 |
| | ■ China Telecom users | 10800 1521694 |

**Important:** If you should experience a production-down issue, please call: US: 1.877.446.6847 or in Europe, call +44 (0)1483 569388.

# Getting Started

# 1

This chapter describes how to get started with OpenText Vendor Portal. This chapter is organized as follows:


- "Setting Up Your Computer to Use OpenText Vendor Portal" on page 9
- "Logging In and Out" on page 11
- "Navigating OpenText Vendor Portal" on page 12
- "Document Workflow in OpenText Vendor Portal" on page 15
- "Printing Documents" on page 16
- "Searching for Documents and Other Data" on page 16
- "About Document Version Numbers" on page 17
- "Working with Document-related Notices" on page 18
- "Email Notifications" on page 19
- "Timing Out" on page 19


## Setting Up Your Computer to Use OpenText Vendor Portal

This section describes several actions to improve your use of OpenText Vendor Portal.

This section is organized as follows:


- "System Requirements" on page 9
- "Internet Browser Setup" on page 10


### System Requirements

OpenText Vendor Portal has the following system requirements:

- Microsoft Windows XP, Vista, or Windows 7 operating system
- Internet connection (faster connection speed produces better performance)
- One of the following Internet browsers:
  - Internet Explorer 7 or higher
  - Mozilla Firefox 3 or higher
- Printer to print documents and, if you wish, shipping labels

  **Note:** No specific types of printers are required to print shipping labels, but your trading partner may recommend certain printers to meet quality standards. OpenText Vendor Portal generates shipping labels as PDF files, which can be printed on most printers.

- Adobe Reader to view and print documents (PDF files) and, if you wish, shipping labels and this user guide.

  To view or print a PDF, you must have Adobe Reader installed on your computer. To install Adobe Reader free of charge, go to:

  http://www.adobe.com/products/acrobat/readstep2.html

## Internet Browser Setup

To fully use OpenText Vendor Portal, you must do the following:

- Add OpenText Vendor Portal to your Internet browser's list of trusted sites.
- Turn off popup blockers in Internet Explorer
- Disable any add-on toolbars such as from Google or Yahoo.

Use the following procedures.

### To add OpenText Vendor Portal to your list of trusted sites

1. Open Internet Explorer.
2. In the browser, click **Tools > Internet Options** to open the dialog box.
3. Click the **Security** tab to open it.
4. Click **Sites** to open the Trusted Sites dialog box. The OpenText Vendor Portal Internet address (URL) should automatically populate the **Add this website to the zone** field.
5. Click **Add** to add the URL to the Websites box below the field.
6. Click **Close**.

   The dialog box closes. The Trusted Sites icon now displays at the right side of the status bar at the bottom of the browser page.

### To turn off Internet Explorer popup blocker

1. Open Internet Explorer.
2. In version 7x, in the browser click **Tools > Pop-up Blocker > Turn Off Pop-up Blocker.**

   In version 6x, in the browser to temporarily allow a site to display pop-ups, click the Information Bar near the top of the page when it notifies you that a pop-up has been blocked, then click **Temporarily Allow Pop-ups**.

### To turn off add-on toolbar popup blockers

- In the Google toolbar, click the popup icon to change its status from blocking to allowing popups, as shown below.



- In the Yahoo toolbar, click the **Pop-Up Blocker** icon to open a menu, then in the menu click **Enable Pop-Up Blocker** to remove the check mark next to that option.

# Logging In and Out

Use the following procedure to log into OpenText Vendor Portal.

**Note:** OpenText Vendor Portal has user roles, called user groups, which represent a set of access privileges—for example, to only view documents, or to view and create documents. User groups can be created by an OpenText Vendor Portal system administrator upon request.

This section is organized as follows:



## Logging In

### To log into OpenText Vendor Portal

1. Go the web address of OpenText Vendor Portal: https://vendorportal.gxs.com
2. On the login page, type your User ID and Password, then click **Login**.

   OpenText Vendor Portal opens to the **Customer Orders** page on the **Shipping** tab. For a description of this page and OpenText Vendor Portal navigation in general, see "Navigating OpenText Vendor Portal" on page 12.

   If you forget your password or wish to change your password, see "To reset a forgotten password" on page 11. Passwords do not expire.

## Logging Out

### To log out of OpenText Vendor Portal

- On any page in the application, click the **Logout** icon at the upper right corner of the page.

## Resetting a Forgotten Password

You must know your User ID (also called Vendor Portal ID) to use this procedure. If you want to change your password but have not forgotten it, see "Working with Your Profile " on page 109.

### To reset a forgotten password

1. On the login page, click **Forget Password?** to open a dialog box.
2. In the **Vendor Portal ID** field, type your ID.
3. In the **Characters** field, type the characters you see in graphic.

   **Note:** If you cannot read the characters, click **Refresh** next to the graphic to display a new set of characters that perhaps you can read more easily.
4. Click **Continue**.

   A dialog box informs you that instructions to reset your password has been emailed to you. The email may appear in your email junk folder.

   If you do not have an email address on file with OpenText Vendor Portal, contact Cloud Support Services for assistance with your password. See "Product Support and Assistance" on page 7.

**5** Click **OK** to close the dialog box.

**6** Open the email, then click the hyperlink it contains.

The OpenText Vendor Portal page opens where you can reset your password.

**7** In the top field, type your ID.

**8** In each of the bottom two fields, type your new password. The password must be at least six characters long and can include letters (upper and/or lower case for case sensitivity), numerals, and other characters (#,$, and so on).

**Note:** The graphic between the two fields indicates how strong the password is to ensure security. For a stronger password, use a more complex combination of numerals and letters and upper and lower cases.

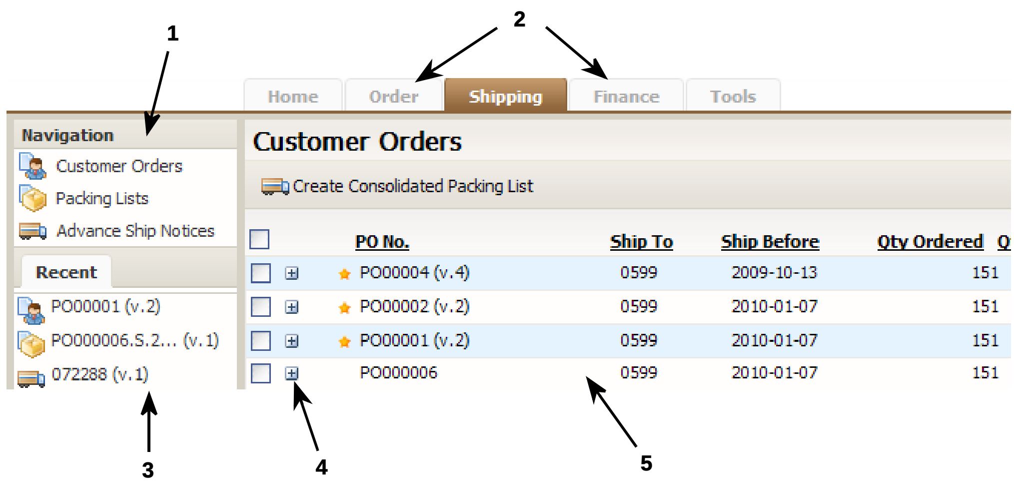
**9** Click **Continue** to create the password.

A new page opens.

**10** Click **Proceed to Vendor Portal Login** to open the login page, where you can use your new password to log in.

# Navigating OpenText Vendor Portal

After you log into OpenText Vendor Portal, you see a page divided into the areas described as follows. Use the features described below to navigate the application. The sections that follow provide detailed information about how to work in the various parts of the application.




| | |
|---|---|
| **1** | **Navigation** panel |
| **2** | Tabs |
| **3** | Recently accessed documents |
| **4** | Click a **+ / -** icon to show/hide a row that contains a link to an associated document. |
| **5** | Data display area |

This section includes the following:

■ "Tabs" on page 13

■ "Data Display Area" on page 13

- "Sorting a List" on page 14
- "Navigation Panel" on page 14
- "Recent Documents Panel" on page 14

## Tabs

A row of tabs along the top of the page. The tabs link to the major work areas in the application, such as **Order** and **Shipping**. Your documents are organized among several of these tabs.

Click a tab to open that module of the application and begin working.

The tabs and their contents are as follows:

- **Home**—Work with notices regarding business documents—for example, error alerts—and closed documents and deleted documents. See "Working with Document-related Notices" on page 18.
- **Order**—View lists of customer Orders and perhaps other document types, such as Order Confirmations or Inbound Inventory Advice documents. Note that you can view customer Orders in this tab and in the **Shipping** and **Finance** tabs. See "Using the Order Tab" on page 21.
- **Shipping**—Work with customer Orders, packing lists, Advance Ship Notices, and shipping labels. See "About the Shipping Tab " on page 37.
- **Finance**—Work with Advance Ship Notices, customer Orders, and Invoices. Some trading partners may use other documents that display here, such as Remittance Advice. See "Using the Finance Tab " on page 95.
- **Tools**—Work with your user profile, contacts list, saved carton settings, and document transaction log. See "Tools" on page 109.

## Data Display Area

Under the row of tabs, a large panel displays. When you open a document, the document data displays here. When you view a list of documents or other records, the list displays here.

Note the following when viewing a list:

- List pages order the records in descending numeric or alphabetical order based on the first (far left) column on the page.

  **Note:** By default, OpenText Vendor Portal displays a maximum of 25 rows in a list. To modify this, see "Changing the Maximum Number of Rows that Display" on page 112.

- If more records exist than fit on a single page, a **Display** list appears at the top right. It contains a set of options to display different sections of the list—for example, 1-25 of 130, 26-50 of 130, and so on. Click an option in the list to display that section of the list.
- To display only documents you have not yet opened, click the **Unread Only** check box in the top right to place a check mark in it. The page resets to show only unread documents for the tab and **Navigation** option selected.

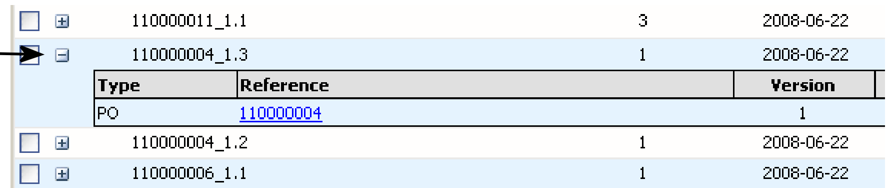
A gold star displays in the row of each unread document on the page.

**Note:** To narrow your results further, select the **Unread Only** check box, then use the **Search** function as described in “To search for a document or text” on page 16.

- On pages that list documents, an **+ / -** icon in a row indicates that the document is associated with another document in the system. Click the icon to show (**+**) or hide (**-**) rows that display information about those documents and hyperlinks to open them.

  For example, in a packing list row click the **+ / -** icon to display a new row that links to the customer Order associated with the packing list. Click the icon again to hide the row.

1




**1** Click the **+ / -** icon to show or hide the row with an associated document.

## Sorting a List

To sort a list alphabetically or numerically using the values in a specific column, click that column header. For example, to sort a **Customer Orders** list by Purchase Order Number, click the **P.O. No.** column header.

## Navigation Panel

At top left, a **Navigation** panel, which contains links to pages related to the selected tab—for example, **Customer Orders** and **Advance Ship Notices** for the **Shipping** tab.

The options include document types associated with documents that you and your trading partner exchange. This may include, for example, Order Confirmation and Remittance Advice documents, depending on your trading relationship.

The **Navigation** panel displays on all tabs. Click a link in the panel to display that data in the data display area.

## Recent Documents Panel

At bottom left, a **Recent** documents panel displays. It lists in order links to the 10 most recent inbound and outbound documents that you (the specific user, not your company) accessed in the past 30 days.

Roll your mouse pointer over a document in the list to view the document number and type of document—for example, Invoice or ASN. Click a link to open that document. Each document type is also indicated by a different icon, common examples of which follow:

| Icon | Document Type |
|---|---|
|  | Purchase Order |
|  | Purchase Order Response |
|  | Packing List |
|  | Advance Ship Notice (ASN) |
|  | Invoice |

**Note:** The actual document locations are the **Order**, **Shipping**, and **Finance** tabs, depending on the type of document. They also contain documents not recently opened.

The **Recent** panel displays on all tabs except **Tools**.

# Document Workflow in OpenText Vendor Portal

The following is a high-level overview of document workflow in OpenText Vendor Portal:

1. Open a customer Order in the **Order** tab or **Shipping** tab.
2. Create a shipment by creating a packing list in the **Shipping** tab.
3. Create and pack cartons in the **Shipping** tab.
4. Create packing lists in the **Shipping** tab.
5. Print carton labels for the shipment in the **Shipping** tab.
6. Create and send an Advance Ship Notice in the **Shipping** tab or **Finance** tab.
7. Create and send an Invoice in the **Finance** tab.

In general, you create each sequential document from its originating document in the workflow. For example, you can create a packing list directly from the page displaying the customer Order. Likewise, you can print shipping labels and create ASNs from the packing list. Finally, you can create Invoices from the finalized ASN.

OpenText Vendor Portal sends documents in real time, not in batches.

**Note:** Document format, fields, and layout requirements vary somewhat among trading partners. As a result, the examples in this guide may not exactly match how documents display in your trading partnership. In addition, some fields may be configured to automatically populate. This varies by trading partner.

## Asterisks Indicating Required Fields in Document Forms

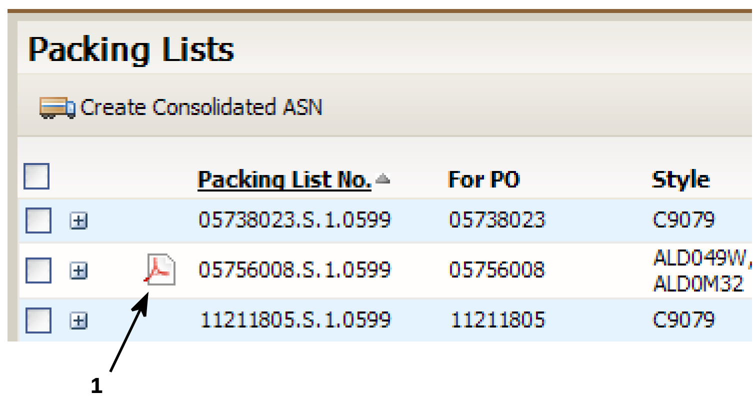
OpenText Vendor Portal forms for various documents display an asterisk (*) for some fields:

- A red asterisk indicates that the field is always required for this document type. OpenText Vendor Portal validates these fields to ensure they are populated.

- A black asterisk indicates that the field is conditionally required. This means that the field might be required for another reason, such as the field is required only if an associated field is used in the document. OpenText Vendor Portal does not validate that these fields are populated.

## Printing Documents

After you print a document in a tab, the PDF icon will display next to the document in the list. If you have not printed the document, the PDF icon will not display next to the document.




**1** PDF icon indicates a PDF print file has been printed or downloaded.

## Searching for Documents and Other Data

Use the **Search** feature in all tabs to quickly find documents, trading partners, contacts, and other data.

### To search for a document or text

1. Go the tab associated with the document you wish to search for—for example, **Order**.

   **Note:** OpenText Vendor Portal searches for documents within the selected tab and **Navigation** option, not the entire system.

2. In the **Navigation** panel, select the option associated with the document—for example, **Customer Orders**.
3. In the **Search** field above the data display, type the full or partial document number, or a full or partial word such as a trading partner name.

   **Note:** A partial number can exist in any part of the full number and may return multiple documents. Word values are not case sensitive.

4. Click **Search**.

   OpenText Vendor Portal searches all columns and fields on the page. The page resets to display the search results.

# About Document Version Numbers

OpenText Vendor Portal displays only the latest version of any document in the system. OpenText Vendor Portal assigns the version number. OpenText Vendor Portal ignores any revision number specified in the document itself.

OpenText Vendor Portal displays the current version number of the customer Order, packing list, ASN, or Invoice in two places:

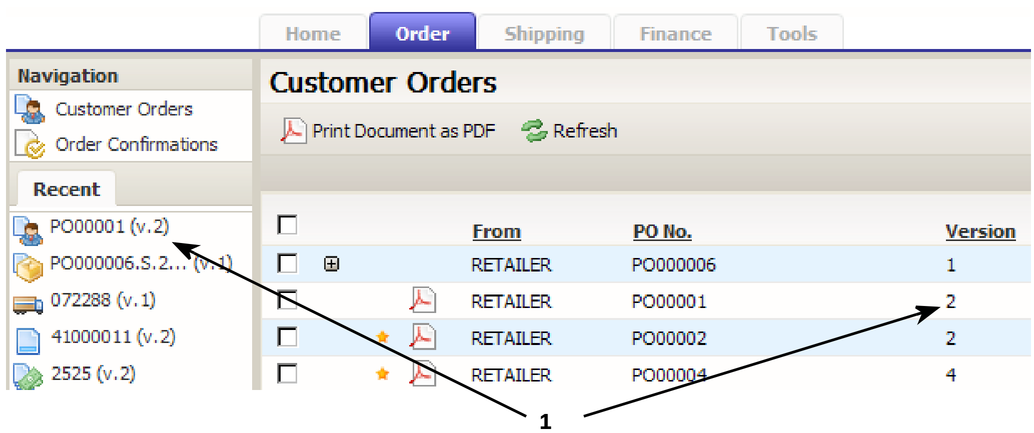
- Next to the document number in the **Recent** tab on the left.
- Version column on some document list pages.

For example, “(v.1)” in the **Recent** tab indicates the first version of the document, “(v.2)” indicates the second version, and so on.

**Important:** Only the latest version of a document displays in OpenText Vendor Portal.

For information about customer Order version numbers, see “Customer Order Version Numbers” on page 17.

The example below shows both uses.




**1** Version number indicators in the **Recent** tab and on a documents list page.

## Customer Order Version Numbers

An original Purchase Order (850) is version 1, and each subsequent Purchase Order Change (860) or revised PO displays as version 2, version 3, and so on.

**Note:** OpenText Vendor Portal does not update turnaround data in the Purchase Order. Edit the turnaround documents as needed.

You can still execute actions against an earlier version of a customer Order. If you have already created a packing list and ASN against an earlier version of a customer Order, do one of the following:

- Delete the existing packing list and ASN, then create new ones using the latest version of the customer Order.
- Manually modify the existing packing list and ASN to make the necessary changes.

# Working with Document-related Notices

This section describes how to work with document notices, such as alerts about documents that contain errors.

The **Notices** list displays the results of the import, export, and print batch (for example, printing labels) operations initiated or requested by you or other users in your organization. It also displays Text Messages (864), if any, from your trading partners.

The **Notices** table provides the date and message for processes without you having to check statuses manually.

The list is sorted by the date when the process began. It displays notices for the last 30 days.

OpenText Vendor Portal does not automatically purge notices from the system. To remove them, you must delete them as described below.

A gold star indicates the notice is marked unread. In addition, if you have unread notices a warning icon and message displays above the tabs on all pages. Click the message link to automatically jump to the **Home** page, where you can view the notice. When you close the notice, the gold star and warning message will disappear. To retrieve these markings, mark the notice as unread, as described below.

This section contains the following procedures:

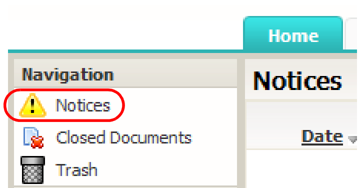
- "Viewing Notices" on page 18
- "Deleting Notices" on page 19
- "Marking Notices Read or Unread" on page 19

See also "Deleting and Restoring Documents" on page 107 and "Viewing Closed Documents" on page 31.

## Viewing Notices

### To view a notice

1 Click the **Home** tab. The **Notices** list appears.




2 Find the notice. See also "Searching for Documents and Other Data" on page 16.

3 Click the row for the message you wish to read.

A window opens and displays the message.

To close the message but leave it in the list, click **Close** in the window.

To delete the message from the list, click **Delete & Close** in the window.

## Deleting Notices

**To delete a notice**

**Note:** You cannot restore deleted notices.

1 Click the **Home** tab.
2 In the **Notices** list, select one or more notices in the list by clicking the notice check box to place a check mark in it.

   **Note:** To select all notices for removal, click the check box in the table header.

3 Click **Delete**.

   The notice is removed and the page refreshes with the updated list.

## Marking Notices Read or Unread

**To mark a notice as read or unread**

A gold star in the row of a notice indicates that the notice has not been read. When you open a notice, OpenText Vendor Portal automatically marks the notice as read (that is, no gold star displays for that notice).

Use the following procedure to manually mark notices as read or unread based on your needs.

1 Click the **Home** tab.
2 In the **Notices** list, select one or more notices in the list by clicking the notice check box to place a check mark in it.

   **Note:** To select all notices, click the check box in the table header.

3 Do either of the following:
   - To mark the selected notices as read, click **Mark as Read**. The page resets.
   - To mark the selected notices as unread, click **Mark as Unread**. The page resets.

# Email Notifications

OpenText Vendor Portal sends an email notification to your company when a new document (typically, a customer Order) from one of your trading partners is received by the application. It does not send email notifications for Functional Acknowledgement (997) documents.

OpenText configures the email address that specifies the recipient of the email notification.

# Timing Out

Your OpenText Vendor Portal session will automatically end if your browser remains idle for one hour. Five minutes before the application disconnects, an alert will display to remind you to save your work. If you do not save before the application logs you out, your work after last saving will be lost.

The status bar at the bottom of the browser displays the amount of time remaining in your session before you are automatically logged out.

# Orders

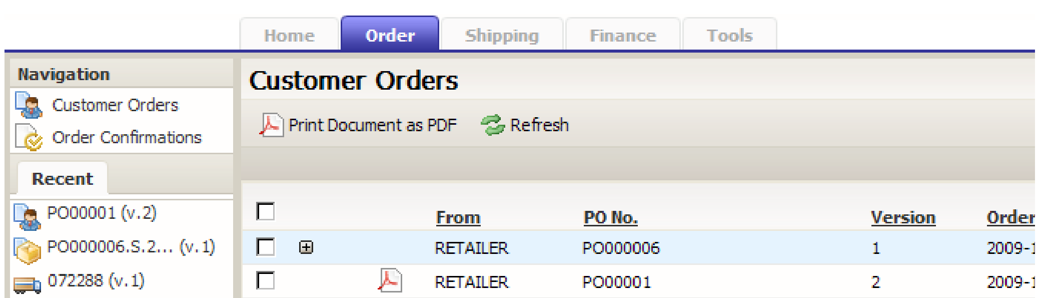
2

This chapter describes how to work with customer Orders (Purchase Orders) and some related documents in OpenText Vendor Portal. This chapter is organized as follows:



## Using the Order Tab

Use the **Order** tab to work with customer Orders and Order Confirmations, if the latter are included in your implementation.




The two **Order** tab **Navigation** panel options in this example are:

- **Customer Orders**—View a list of Purchase Order (850) and Purchase Order Change (860) documents received by your company from the trading partner. A customer Order lists items to be purchased and related information.

  See "Viewing Customer Orders" on page 22.

- **Order Confirmations**—View a list of Order Confirmations (also called acknowledgments or PO responses) that your company has sent to the trading partner to confirm customer Orders.

  **Note:** Order Confirmations (855), also called Purchase Order Responses or Purchase Order Acknowledgements, are EDI documents that some retailers require trading partners to send in addition to the Functional Acknowledgments (997) automatically sent by OpenText Vendor Portal when an inbound document is received.

  See "About Order Confirmations" on page 32.

The **Orders** tab might include Order Status Inquiry (869) (from a trading partner), Order Status Response (870) (from a supplier company), or Inventory Inquiry/Advice (846) documents, depending on your implementation. Navigation options for these would display in the top left panel.

# Receiving Test Purchase Orders

OpenText recommends that you receive test Purchase Orders in a separate test environment instead of in the production environment where you exchange real documents with your trading partners. To set up a test environment, see "Product Support and Assistance" on page 7.

If you choose not to set up a separate test environment, you can receive test Purchase Orders in the production environment as though they are real Purchase Orders. Trading partners typically mark test Purchase Orders with special Reference Numbers that indicate the PO is a test document—for example, test001, test002, and so on.

# Viewing Customer Orders

Use the following procedures to view customer Orders from the **Orders** tab.

**Note:** The **Customer Orders** lists in the **Order** and **Finance** tabs are identical. The **Customer Orders** list in the **Shipping** tab includes the same Orders, but several columns include shipping information. For details, see "Viewing Customer Order Shipment Data" on page 37.

### To view a customer Order

1. Click the **Order** tab.

   The **Navigation** panel option **Customer Orders** is selected automatically.

The **Customer Orders** page lists customer Orders for the trading partner.

**Note:** By default, OpenText Vendor Portal displays a maximum of 25 rows in a list. To modify this, see "Changing the Maximum Number of Rows that Display" on page 112.

**Note:** OpenText Vendor Portal automatically sends a Functional Acknowledgment (997) for a successfully received inbound document. This information does not display in the application, but system administrators can confirm whether or not a 997 was sent.

For each Order, the data columns list the following information, from left:

- Gold star if the document is unread, indicating a new document.
- Adobe Acrobat icon if you have previously printed this Order.
- From—Name of your trading partner that sent the Order.
- Purchase Order Number.
- Version—See "Customer Order Version Numbers" on page 17.
- Order Date.
- Type—Purchase Order Type code:
  - SA—Stand-alone Order
  - BE—Blanket Order/Estimated Quantities (not firm quantity commitment)
  - BK—Blanket Order (Quantity Firm)
  - RE —Reorder
  - RL—Release or Delivery Order
- Ship To—Typically, the Distribution Center or Store number specified in the Order.
- Last Modified—Date and time the Order was received.

2 To view documents or notices related to an Order, click the **+/-** icon in the row of the Order.

A new row displays immediately below the customer Order. It can contain, for example, a packing list, ASN, Purchase Order Response (also called an Order Confirmation) or a batch delivery notice associated with the PO. If multiple records exist, multiple rows display.

Click the new row to view that document or notice.

To hide the new rows, click the **+/-** icon next to the Order.

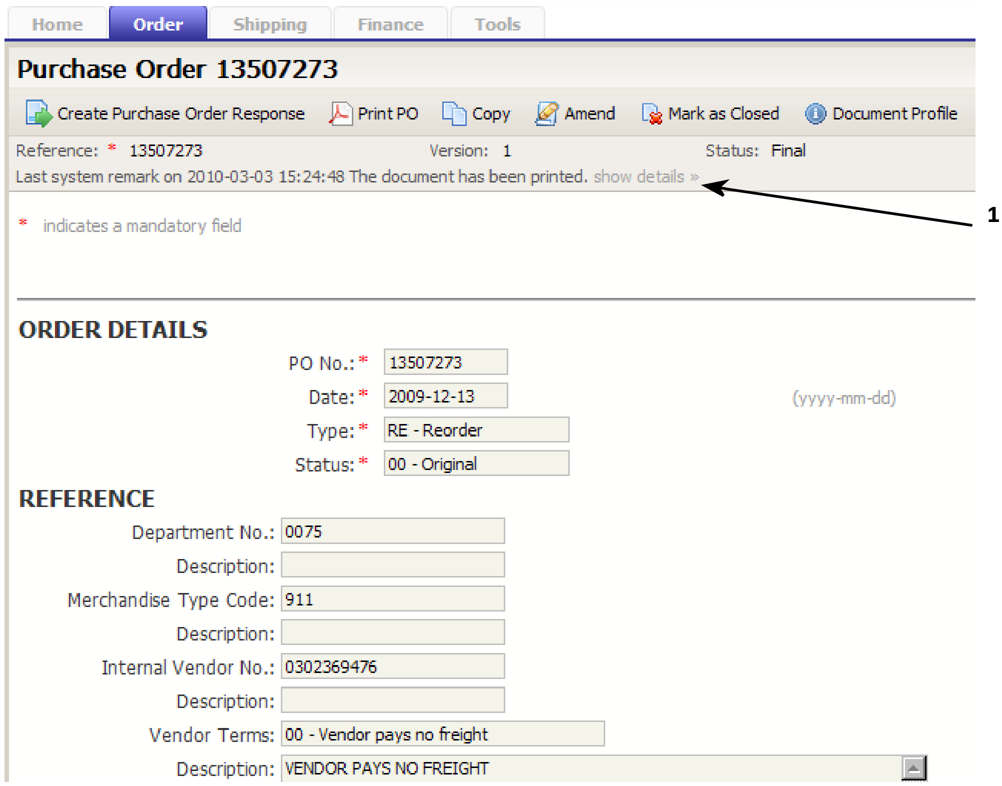
3 To view an Order, click that customer Order row.

A new page displays the customer Order document as formatted by OpenText Vendor Portal. At the top displays the Purchase Order number, version of the document, status of the document, and the date and time it was received (called Date Modified).

**Note:** The status of inbound documents is always Final.

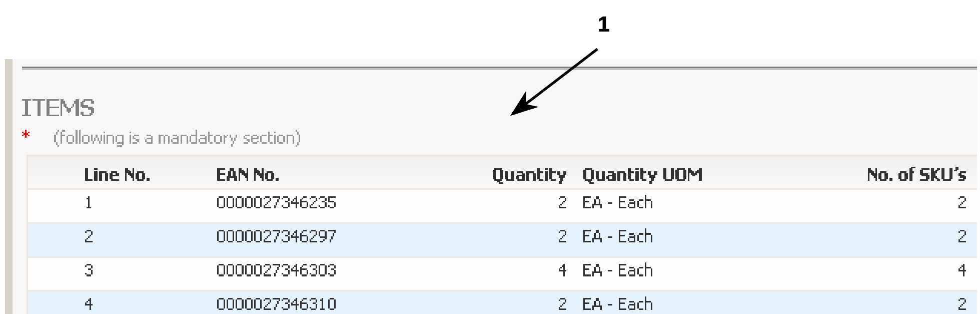
The top of the **Purchase Order** page may also display the most recent system message about the document (for example, if the document was printed) and a link to view any previous system remarks related to the document.

The rest of the page displays the document data in sections such as **Order Details** and **Reference Details**.



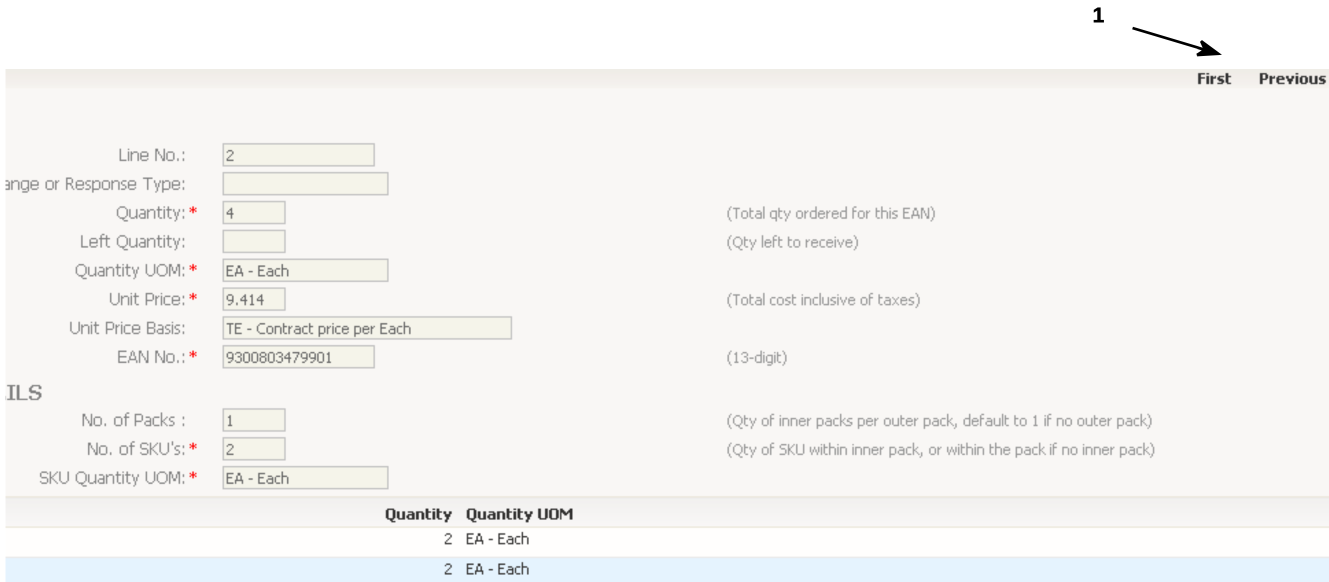

**1** Click the link to display previous system remarks, if any.

The **Items** section at the bottom lists the items in the Purchase Order.




**1** Line items table. Each item row is link to open a details page for each item.

**4** To view item details, click a row in the **Items** table to open a page that displays details for the item.




**1** Use the paging links to page among items in an Order.

**5** To view details of other items without returning to the Order, click the paging links in the upper right corner:

- First—Click to view the first item in the list.
- Previous—Click to view the item immediately before the currently displayed item.
- Next—Click to view the item immediately after the currently displayed item.
- Last—Click to view the last item in the list.

**6** To exit the items window and return to the customer Order, click **Exit** in the top left corner.

To modify a PO, see "To amend a customer Order" on page 29.

# Creating Customer Orders

Use the following procedures to create customer Orders, which some retailers allow:

- "To manually create a customer Order" on page 25
- "To model a new customer Order on an existing Order" on page 28

### To manually create a customer Order

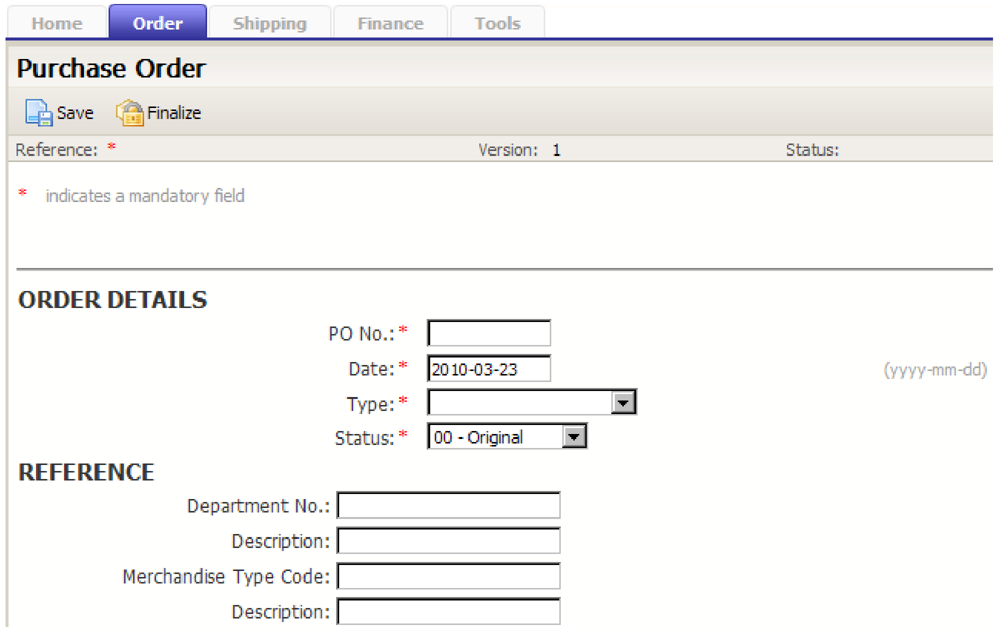
Suppliers use this procedure to manually create customer Orders that are not available by EDI. You can create a reorder or a stand-alone Order.

**1** Click the **Order** tab or the **Finance** tab.

The **Customer Orders** option in the **Navigation** panel is selected automatically. The page lists customer Orders for the trading partner.

**2** Click **Create <*Trading Partner Name*> PO**.

A page opens to create a PO for the trading partner.

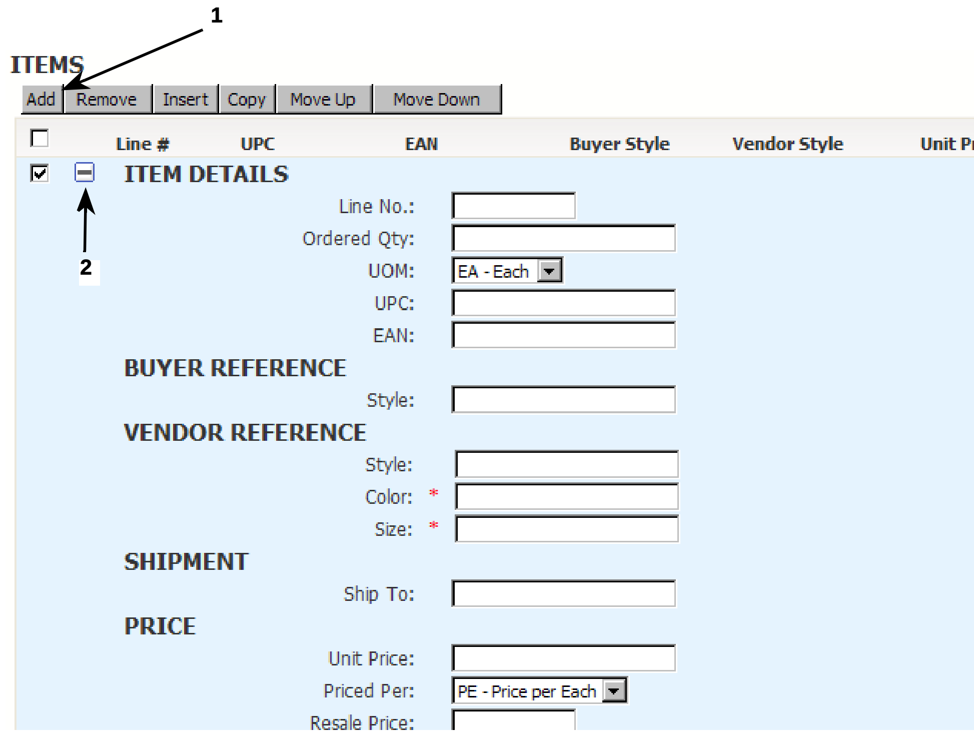



**3** Fill in the **Purchase Order** form as needed to create the PO—for example, a PO number.

**Note:** See "Asterisks Indicating Required Fields in Document Forms" on page 15.

**4** To add an item, in the **Items** section click **Add**.

The Item Details section displays.




**1** Click **Add** to add an item to the PO.

**2** Click the **+ / -** toggle to show or hide the Item Details for an item.

5 Enter data as needed to define the item.

6 To add another item, click **Add** again, then enter data. Repeat as needed.

To display or hide the **Item Details** for an item, click **+ / -** for that item row.

To remove an item, select the check box for the item you want to copy, then click **Remove**. The item row disappears.

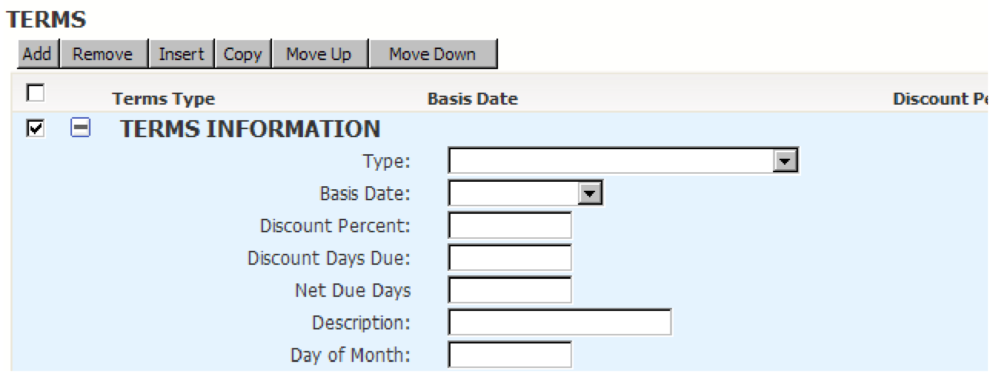
To insert an item row at a specific location in the list, select the check box for the item below where you want to insert the new item, then click **Insert**. A new Item Details section opens at that location in the list.

To copy an item to use as the model for a new item because most of the data is the same, select the check box for the item you want to copy, then click **Copy**. OpenText Vendor Portal adds a new item row that contains the same data, including the line number, as the item you copied. Edit the data as needed.

To move an item row up or down in the list of items, select the check box for the item you want to move, then click **Move Up** or **Move Down** as needed to place the item where you want it.

7 To add terms to the PO, under Terms click **Add**.

The Terms Information section of the PO displays.



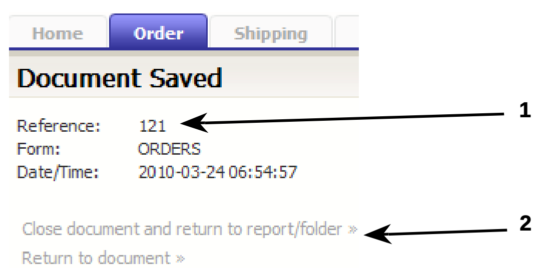

**8** Enter data as needed to define the terms.

**Note:** The retailer may support multiple terms, such as special terms for certain items.

**9** To save the PO in draft status and not finalize it, click **Save**.

To finalize the PO so it displays in the PO list in the **Customer Orders** list in the **Shipping** tab, click **Finalize**.

In either case, a save message displays. Note the **Reference** number to identify the PO on OpenText Vendor Portal list pages.




| | |
|---|---|
| 1 | Note the Reference Number to identify the PO in the Customer Orders list. |
| 2 | Click a link to either close the document or to reopen it to continue working. |

Below the save message, click either of the following links:

- **Close document and return to report/folder** to close the PO and reopen the **Customer Orders** list page. The new PO displays at the top of the list.
- **Return to document** to reopen the PO to continue working in it.

### To model a new customer Order on an existing Order

You may want to do this to create a new PO based on an existing PO. This saves data entry time.

**1** Click the **Order** tab.

The **Customer Orders** option in the **Navigation** panel is selected automatically. The page lists customer Orders for the trading partner.

**2** Click a customer Order to open it.

**3** Click **Copy**.

The Order resets to display editable fields that contain the same data as the Order you copy.

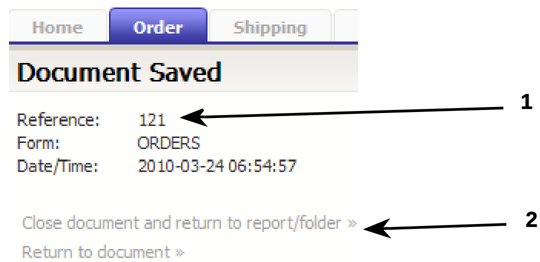
4 Edit the data as needed to create the new PO. You must change at least the PO Number (also called the Document Reference Number).

For details about editing a PO, see "To amend a customer Order" on page 29.

5 To save the PO in draft status and not finalize it, click **Save**.

To finalize the PO so it displays in the PO list in the **Customer Orders** list in the **Shipping** tab, click **Finalize**.

In either case, a save message displays. Note the **Reference** number to identify the PO on list pages.




| | |
|---|---|
| **1** | Note the **Reference** number to identify the PO in the **Customer Orders** list. |
| **2** | Click a link to either close the document or to reopen it to continue working. |

Below the save message, click either of the following links:

- **Close document and return to report/folder** to close the PO and reopen the **Customer Orders** list page. The new PO displays at the top of the list.

  **Note:** If the PO does not display at the top of the list, click the **Last Modified** column header twice to sort the list.

- **Return to document** to reopen the PO to continue working in it.

# Amending Customer Orders

Use the following procedure to amend a customer Order.

You cannot amend an Order that has already been shipped or invoiced.

### To amend a customer Order

1 Open the Order you want to amend, as described in "To view a customer Order" on page 22.

2 Click **Amend**.

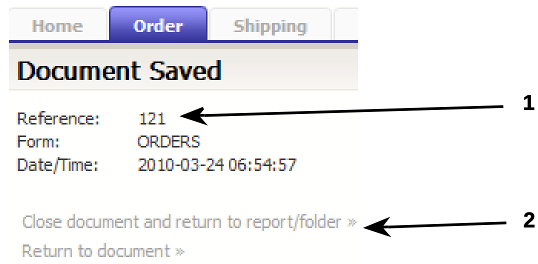
The Order resets to display editable fields.

3 Make changes to the PO. (You cannot change the PO number.)

4 To save the PO in draft status and not finalize it, click **Save**.

To finalize the PO so it displays in the PO list in the **Customer Orders** list in the **Shipping** tab, click **Finalize**.

In either case, a save message displays. Note the Reference Number to identify the PO on OpenText Vendor Portal list pages.




1 Note the **Reference** number to identify the PO in the **Customer Orders** list.

2 Click a link to either close the document or to reopen it to continue working

Below the save message, click either of the following links:

- **Close document and return to report/folder** to close the PO and reopen the **Customer Orders** list page. The new PO displays at the top of the list.

  **Note:** If the PO does not display at the top of the list, click the **Last Modified** column header twice to sort the list.

- **Return to document** to reopen the PO to continue working in it.

# Printing Customer Orders

Use the following procedure to print customer Orders either as POs or PO Difference Reports.

### To print a customer Order

**Important:** You must turn off any popup blockers for this function to work.

1. Click the **Order** tab.

   The **Customer Orders** option in the **Navigation** panel is selected automatically. The page lists customer Orders for the trading partner.

2. Do one of the following:

   - On the **Customer Orders** list page, select the check box for the Order you want to print, then click **Print Document as PDF**.
   - Click a customer Order to open it, then click **Print PO**.

   The **Select Stylesheet** dialog box offers options for printing the PO:

   - Purchase Order
   - Purchase Order Difference PDF—Shows any modifications to the PO since you received it.

3. Click the style sheet you want to use to print the Order.

   The **File Download** dialog box opens to open or save the PDF of the Order.

4. Click **Open** to open the PDF of the Order, then print the PDF to your printer.

   To print PDF files, see “System Requirements” on page 9.

# Preventing New Packing Lists for an Order

Use the following procedure to prevent users from creating a new packing list for a customer Order. Do this by marking the PO as closed.

**Note:** If OpenText Vendor Portal receives a Purchase Order Change, or a new PO with the same PO number, the closed PO will be reopened to enable a user to create a new packing list for the PO.

To create a packing list, see "Creating Packing Lists " on page 43.

## Marking a PO as Closed

Use this procedure to mark a PO as closed. This action hides the PO on Customer Orders lists on the **Orders**, **Shipping**, and **Finance** tabs. It does not impact associated documents, such as packing lists, ASNs, and Invoices.

However, if you receive a new version of the PO (that is, an 860 PO Change document), the changed PO will be in Final status in OpenText Vendor Portal.

### To prevent new packing lists for a customer Order

1. Click the **Order** tab.

   The **Customer Orders** option in the **Navigation** panel is selected automatically. The page lists customer Orders for the trading partner.

2. Click a customer Order to open it.
3. Click **Mark as Closed**.

   The PO will no longer display in the **Customer Orders** list in the **Shipping** tab. To open the PO again, see "Viewing Closed Documents" on page 31.

## Viewing Closed Documents

Use this procedure to view a list of closed documents, which are typically POs closed to prevent a user from creating a packing list for the PO.

### To view closed documents

1. Click the **Home** tab.
2. Click the **Closed Documents** option in the Navigation panel.

   The **Closed Documents** page lists closed Orders.

3. To view a closed document, click its row in the list.

   To view a related document, such as the Order in Final status that is associated with the Order is Closed status, click the **+ / -** icon in the row of the closed document.

# Viewing Information about Customer Orders

Use the following procedure to view information about a customer Order, such as an audit trail, document delivery information, and related documents. This is also called viewing a *document profile*.

### To view a information about a customer Order

1. Click the **Order** tab.

The Customer Orders Navigation panel option is selected automatically. The page lists customer Orders for the trading partner.

2 Click a customer Order to open it.

3 Click **Document Profile**.

A new window opens. Click the following tabs as needed to view information:

- **General**—Sections are as follows:
  - Audit trail of who has opened and printed the document and when the action occurred.
  - Document delivery information such as the trading partner, date and time of document delivery, and channel of delivery.
  - Document Batches information about the delivery of the document.
- **Related Documents**—Displays records of documents related to the Order, such as a packing list or ASN, and version information about the current version of the document. This tab displays only if related documents exist for the open document.
- **System Remarks**—Reports of system actions such as error validation and printing. To remove a remark from the list, click its check box to place a check mark in it, then click **Delete**.

4 To close the **Document Profile** window, click **Close** at bottom right.

## Deleting Customer Orders

Use the following procedure to delete a customer Order that you created and that is in Draft status. You cannot delete customer Orders received from 6trading partners, or Orders that you created that are in Final status.

Use this procedure if you create a PO by mistake, for example, or if you do not intend to ship the Order.

See also "Deleting and Restoring Documents" on page 107.

### To delete a customer Order

**Important:** If you delete an Order, you will not be able to work with it in OpenText Vendor Portal.

1 Click the **Order** tab.

The **Navigation** panel option **Customer Orders** is selected automatically. The page lists customer Orders for the trading partner.

2 Click a customer Order that you created. The Order opens.

3 Click **Delete.**

## About Order Confirmations

Not all trading partners support Order Confirmations. Check with your trading partner.

An Order Confirmation (sometimes called a Purchase Order Response or P.O. Acknowledgment) is a document you can create and send to your trading partner in response to receiving a Purchase Order, Purchase Order Change, or an Order Status Inquiry, for example.

You can use it to transmit information about the Order, so it is different than the Functional Acknowledgment (997) that OpenText automatically sends the trading partner to acknowledge receipt of the Order.

# Creating Order Confirmations

Not all trading partners support Order Confirmations. Check with your trading partner.

Use the following procedure to create an Order Confirmation.

### To create an Order Confirmation

1. Open the Purchase Order you wish to create an Order Confirmation for. For details, see "To view a customer Order" on page 22.
2. Click **Create Purchase Order Response**.

   The **Purchase Order Acknowledgement** page opens with some of the data carried over from the Purchase Order.
3. Add and revise data as needed.
4. To save the Order Confirmation to work on it or to not send it now, click **Save**.

   To send the Order Confirmation now, click **Send**.

# Viewing Order Confirmations

Not all trading partners support Order Confirmations. Check with your trading partner.

Use the following procedure to view an Order Confirmation.

### To view an Order Confirmation

1. Click the **Order** tab.
2. Click the **Order Confirmations** option in the **Navigation** panel.

   The **Order Confirmations** page opens.
3. (Optional) To view the related Purchase Order for the Order Confirmation, click the **+/-** icon in the row of the Order.

   A new row displays immediately below the Order Confirmation. It contains the related Purchase Order.
4. To open an Order Confirmation, click that row in the list.

# Sending Order Confirmations

Use the following procedure to send a saved Order Confirmation.

### To send a saved Order Confirmation

1. Click the **Order** tab.
2. Click the **Order Confirmations** option in the **Navigation** panel.
   The **Order Confirmations** page opens.
3. Click an Order Confirmation to open it.
4. Click **Send**.
   The application sending the document to the trading partner.

## Viewing Information about Order Confirmations

Use the following procedure to view information about an Order Confirmation.

### To view information about an Order Confirmation

1. Click the **Order** tab.
2. Click the **Order Confirmations** option in the **Navigation** panel.
   The **Order Confirmations** page opens.
3. Click an Order Confirmation to open it.
4. Click **Document Profile**.
   A new window opens. Click the following tabs as needed to view information:
   - **General**—Sections are as follows:
     - Audit trail of who has opened, finalized, saved, and sent the document and when the action occurred.
     - Document delivery information such as the trading partner, date and time of document delivery, and channel of delivery.
     - Document Batches
   - **Related Documents**—Links to related documents, such as the customer Order the Order Confirmation is related to and other versions of the Order Confirmation.
5. To close the **Document Profile** window, click **Close** at bottom right.

## Deleting Order Confirmations

Use the following procedure to delete an Order Confirmation in Draft status. You cannot delete an Order Confirmation in Final status.

See also "Deleting and Restoring Documents" on page 107.

### To delete an Order Confirmation

1. Click the **Order** tab.
2. Click the **Order Confirmations** option in the **Navigation** panel.
   The **Order Confirmations** page opens.
3. Click an Order Confirmation in Draft status. The Order opens.

4 Click **Delete**.

The document is deleted from **Order Confirmations**.

## Amending Order Confirmations

Use the following procedure to amend an Order Confirmation.

**To amend an Order Confirmation**

1 Click the **Order** tab.

2 Click the **Order Confirmations** option in the **Navigation** panel.

The **Order Confirmations** page opens.

3 Click an Order Confirmation to open it.

4 Click **Amend**.

The page resets to make many of the fields editable.

5 Edit the fields as needed to amend the document.

6 Do the following as needed:

Click **Save** to save the amended Order Confirmation without sending. You can send it later, if you wish.

Click **Send** to send the amended Order Confirmation to the trading partner.

# Packing Lists

# 3

This chapter describes how to work with packing lists in OpenText Vendor Portal. This chapter is organized as follows:



## About the Shipping Tab

With the **Shipping** tab selected, you can use the **Navigation** panel links at the top left to open pages that list Orders, packing lists, or ASNs.

The **Shipping** tab also displays logistical documents such as Motor Carrier Shipment Status (204), Motor Carrier Freight Details/Invoice (210), and Carrier Shipment Status Message (214).

## Viewing Customer Order Shipment Data

The **Customer Orders** list page that you open from the **Shipping** tab lists the same documents as the **Customer Orders** list page in the **Order** tab. In addition, it contains shipment information for each Order.

For a different view of your **Customer Orders** list, see "Viewing Customer Orders" on page 22.

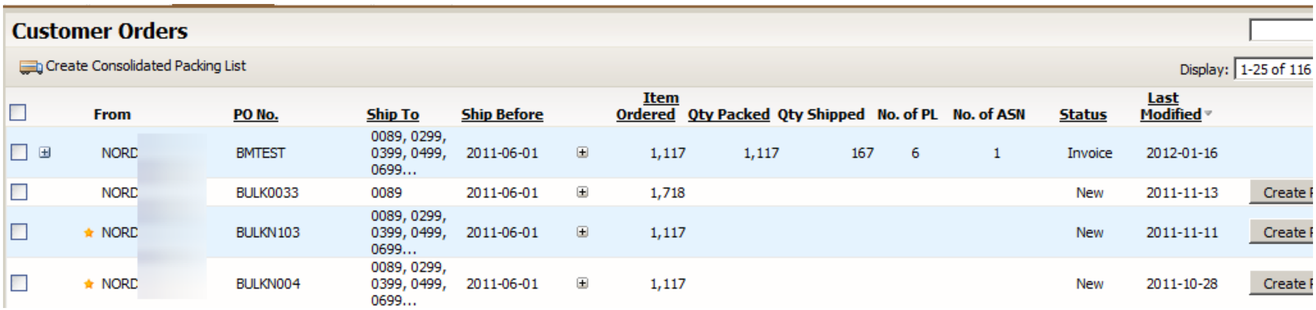
Use the following procedure to view shipment data for customer Orders.

**To view shipment data**

1 Click the **Shipping** tab.

The **Shipping** tab **Customer Orders** page opens.

**Note:** By default, OpenText Vendor Portal displays a maximum of 25 rows in a list. To modify this, see “Changing the Maximum Number of Rows that Display” on page 112.




**Note:** The **Shipping** tab **Customer Orders** list includes different columns than the **Customer Orders** list in the **Order** and **Finance** tabs, which are the same.

From left, the columns display the following information for each Order:

- From—Company that sent the Purchase Order.
- Purchase Order Number.
- Ship To—Typically, the Distribution Center or Store number specified in the Order

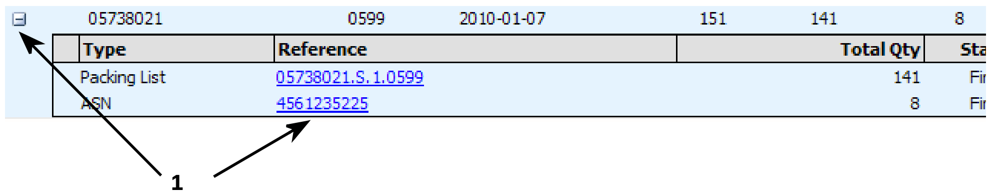
  **Note:** When multiple values exist, OpenText Vendor Portal displays all values. For example, if one Order contains items to be shipped to three stores, OpenText Vendor Portal will list the three Store numbers in the Ship To column.

- Ship Before—Order should be shipped before this date
- **+** icon to show and hide ordered and packed quantities for the Order
- Quantity Ordered
- Quantity Packed—In the case of inner packs, this value is the quantity of inner packs, not the quantity of units contained in the inner packs.
- Quantity Shipped
- Number of Packing Lists (PL) for the Order
- Number of ASNs for the Order
- Status of the Order in Shipping—for example, New or Packing
- Last Modified—Date and time the Order was received. or when the PO was amended or changed with a Purchase Order Change (POC).
- Button to click to create a packing list for the Order, if allowable

2 To view details of an Order, click the row for that Order.

The Order opens in a new page.

3 To view a related document, such as an Order Response, packing list, or ASN, click the **+/-** icon next to the Order to display one or more rows that include links to those documents and some information contained in the documents.




**1** Click the **+/-** icon next to an Order to display links to packing lists, ASNs, and other related documents.

To view a document in the list, click its link. For viewing details of a packing list, see “Viewing Packing Lists” on page 39.

To hide the row, click the **+/-** icon again.

**Note:** In the **Customer Orders** list in the **Order** and **Finance** tab, the **+/-** icon opens rows for related documents or notices, not packing lists.

# Viewing Packing Lists

Use the following procedure to view packing lists in OpenText Vendor Portal.

### To view packing lists

1 Click the **Shipping** tab.

The **Shipping** tab **Customer Orders** page opens.

2 Click the **Packing Lists** option in the **Navigation** panel.

The **Packing Lists** page opens.

**Note:** By default, OpenText Vendor Portal displays a maximum of 25 rows in a list. To modify this, see “Changing the Maximum Number of Rows that Display” on page 112.

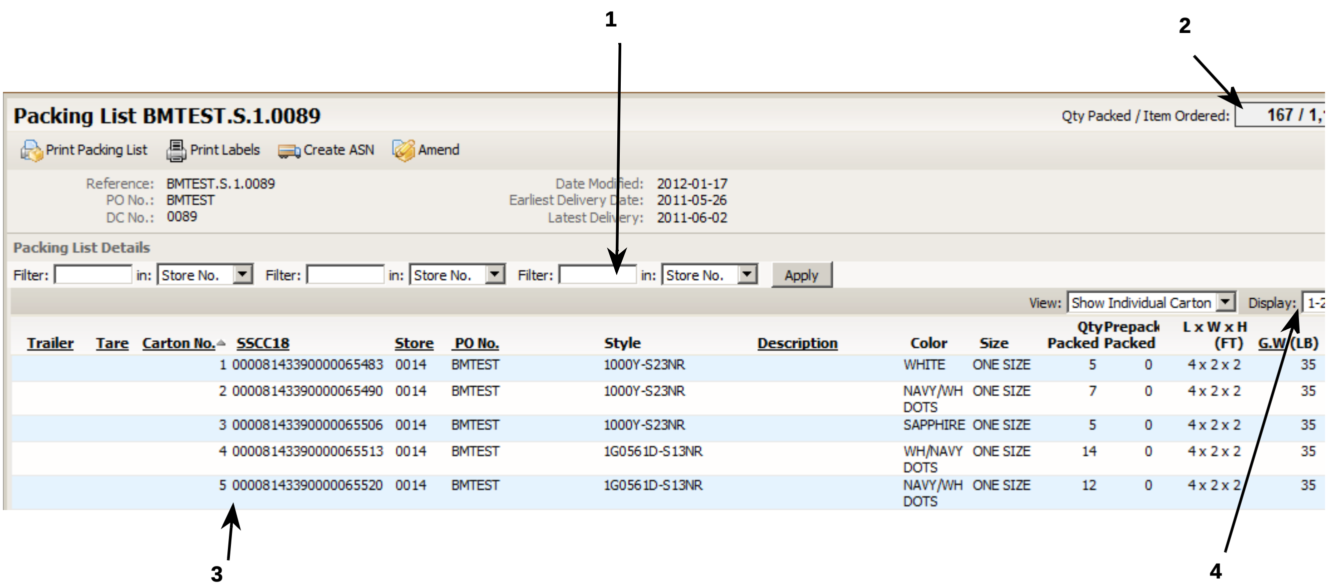

The **Packing Lists** page displays the following, from left, for each packing list:

- For (name of trading partner)
- Packing List Number
- PO number of the PO associated with the packing list

- Style identifier of the item(s) packed
- **+** icon to show or hide Ordered, Packed, Prepack data for that row
- Quantity Ordered
- Quantity Packed—In the case of inner packs, this value is the quantity of inner packs, not the quantity of units contained in the inner packs.
- Ship To—Usually the identifier for a distribution center or store
- Ship Before date
- Status of the packing list, such as Draft (that is, in progress) or Final
- Date the packing list was last modified
- Button to click to create an ASN for the packing list

**3** To view details for a packing list, click that packing list row.

The **Packing List** detail page opens and lists the individual cartons.




| | |
|---|---|
| **1** | Filter bar to search for cartons. |
| **2** | Quantity packed for this packing list, and quantity ordered for the PO. |
| **3** | In the individual carton view., the **SSCC18** column identifies cartons. |
| **4** | Use the **Display** list to display a different range of cartons in the list. |

If the packing list contains more than 25 cartons, use the **Display** list at the upper right to select a range of cartons to display. See also “Changing the Maximum Number of Rows that Display” on page 112.

**Note:** See below to filter the list or to view cartons by group or to view containers.

The columns display the following information, if applicable, for the rows of cartons in the list:

- Trailer identifier
- Tare identifier

- Carton umber
- SSCC18 identifier for the carton
- Store number
- PO number associated with the carton
- Style identifier of items in the carton
- Description of items in the carton
- Color of items
- Size of items
- Quantity of items packed in the carton
- Quantity of prepacks packed in the carton
- Dimensions of the carton
- Gross weight of the carton

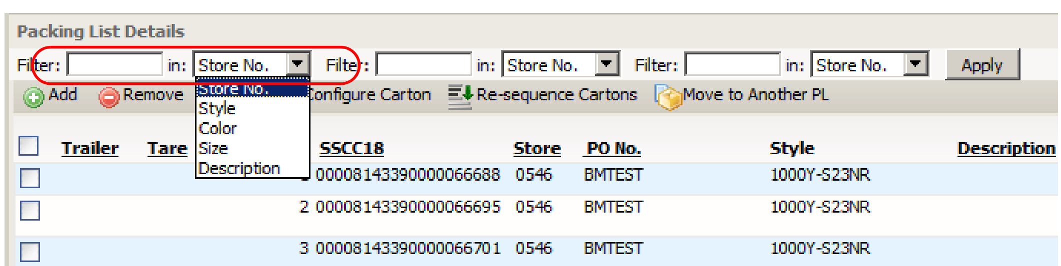
4 See the following as needed:


- “Filtering a List of Cartons in a Packing List” on page 41
- “Viewing Carton Groups in a Packing List” on page 42
- “Working with Containers in a Packing List” on page 42


## Filtering a List of Cartons in a Packing List

See also “Filtering a List of Items when Packing” on page 61.

To restrict a list of cartons in the packing list based on Store No. and/or item contents, use the **Filter** bar above the list.




**Note:** To hide the **Filter** bar, at far right click **Collapse**. To show the **Filter** bar if it’s hidden, at far right click **Expand**.

### To search for cartons

1 After opening a packing list, in the **Filter** bar above the list of cartons, use the pairs of **Filter** and **In** fields to create search criteria. For example, in **Filter** type a value to search (for example, a Store No. or Style number) and in the list at right select the column to search for that value (**Store No.** or **Style**, for example).

For example, type 00096 and select **Store No.**

2 Repeat this in the other pairs to also further narrow the search based on Style Number or Size Code, for example.

3 Click **Apply**.

The list of cartons refreshes to show only cartons that match your search criteria.

To remove the filter, click **Clear**. (Displays after you apply a filter.)

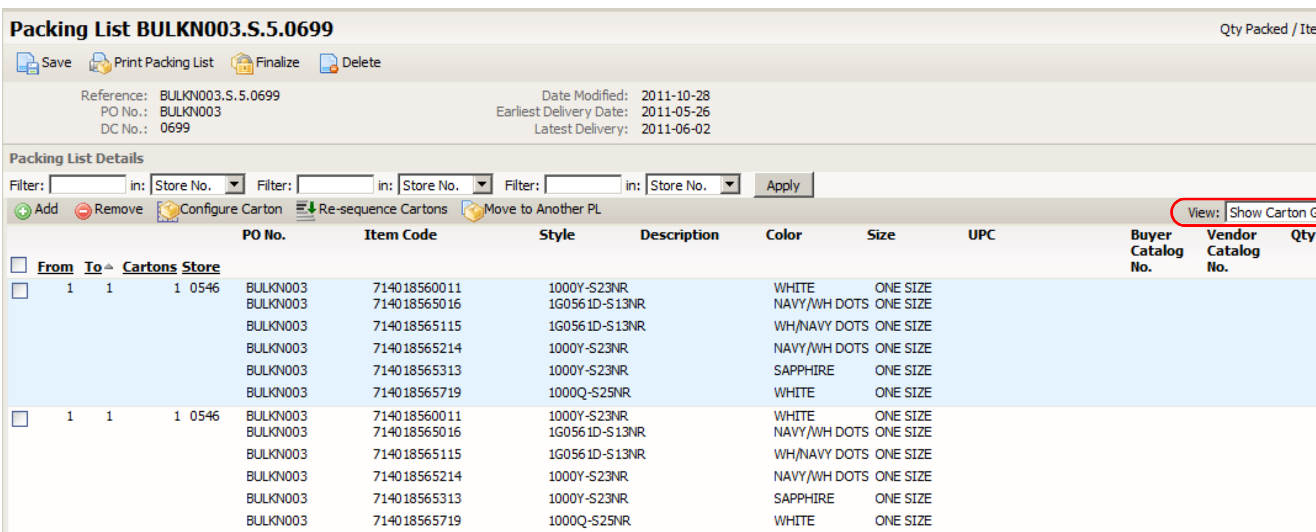
## Viewing Carton Groups in a Packing List

### To view cartons groups

- After opening a packing list, to view data by carton group rather than by individual cartons, in the **View** list at top right, click **Show Carton Groups**.

  **Note:** To return to the individual carton view, click the **Show Individual Cartons** option in the **View** list.

  The page resets to show carton groups.




The first three data columns—**From**, **To**, and **Cartons**—define the carton group. For example, a row with 3 in the **From** column, 4 in the **To** column, and 2 in the **Cartons** column displays data for that group of two cartons—carton number 3 through carton number 4.

In addition to item information also in the individual carton view, the carton group view may display the item code for each carton group.

## Working with Containers in a Packing List

Containers contain the cartons in a packing list.

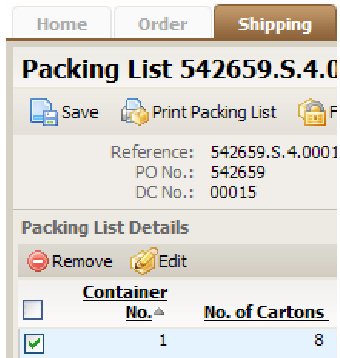
To create containers, see "Assigning Cartons to Containers" on page 65.

You can edit container numbers or remove containers if the packing list is in Draft status.

### To view, edit, or delete containers

1. On the **Packing List** detail page, click the **Show Containers** link at right above the list of cartons.

A new page displays the container number(s) and number of cartons in each container.




A new page shows containers, if any, for the packing list.

2 To change a Container number:

a Select the check box in that row, then click **Edit**.

b In the dialog box, change the number, then click **Apply**.

3 To remove a container:

a Select the check box in that row(s), then click **Remove**.

b In the message box, click **OK** to delete the container(s).

**Note:** This action deletes on the container, not the cartons in the container. The cartons will not belong to a container until a user assigns them.

4 To exit the Container view and display the list of cartons, at top right click **Show Individual Cartons**.

# Creating Packing Lists

Use the following procedure to create one or more packing lists from a customer Order. We call this *packing* the Order. OpenText Vendor Portal offers packing processes that use retailer-specific configurations.

Before beginning, note the following:

- Understand the differences between packing methods in Vendor Portal:
  - Auto Pack—Vendor Portal will automatically *bulk pack* (that is, pack multiple cartons simultaneously) all items for all DCs and all stores in the PO, and it will pack all items the same way. It generates a separate packing list for each DC in the PO.

    Auto Pack is often satisfactory for simple Orders. For more flexibility, use Partial Pack or Ratio Pack.
  - Partial Pack or Ratio Pack—You can do the following in either method, unlike in Auto Pack:
    - Bulk pack items by individual DC
    - Bulk pack items by individual store
    - Bulk pack by individual item

  - Search by size or color
  - Adjust carton weight individually or in bulk.
- Split Pack—Use this method to pack an item that ships in multiple cartons, such as an item with multiple components that are assembled later.

  **Note:** Not all trading communities support this packing method.

- To pack more than 25 items in a carton in a single action, increase the maximum number of records that displays in a list in Vendor Portal. For details, see "Changing the Maximum Number of Rows that Display" on page 112.
- Quantity Packed does not count units contained in inner packs. It counts the inner packs themselves. For example, two inner packs of six rubber balls count toward the Quantity Packed as two, not 12.
- If you plan to send an ASN that uses No Pack format, create a quick packing list by using the procedure "To use Auto Pack for No Pack ASNs" on page 50.

This section is organized as follows:



**To create a packing list**

1. Click the **Shipping** tab.

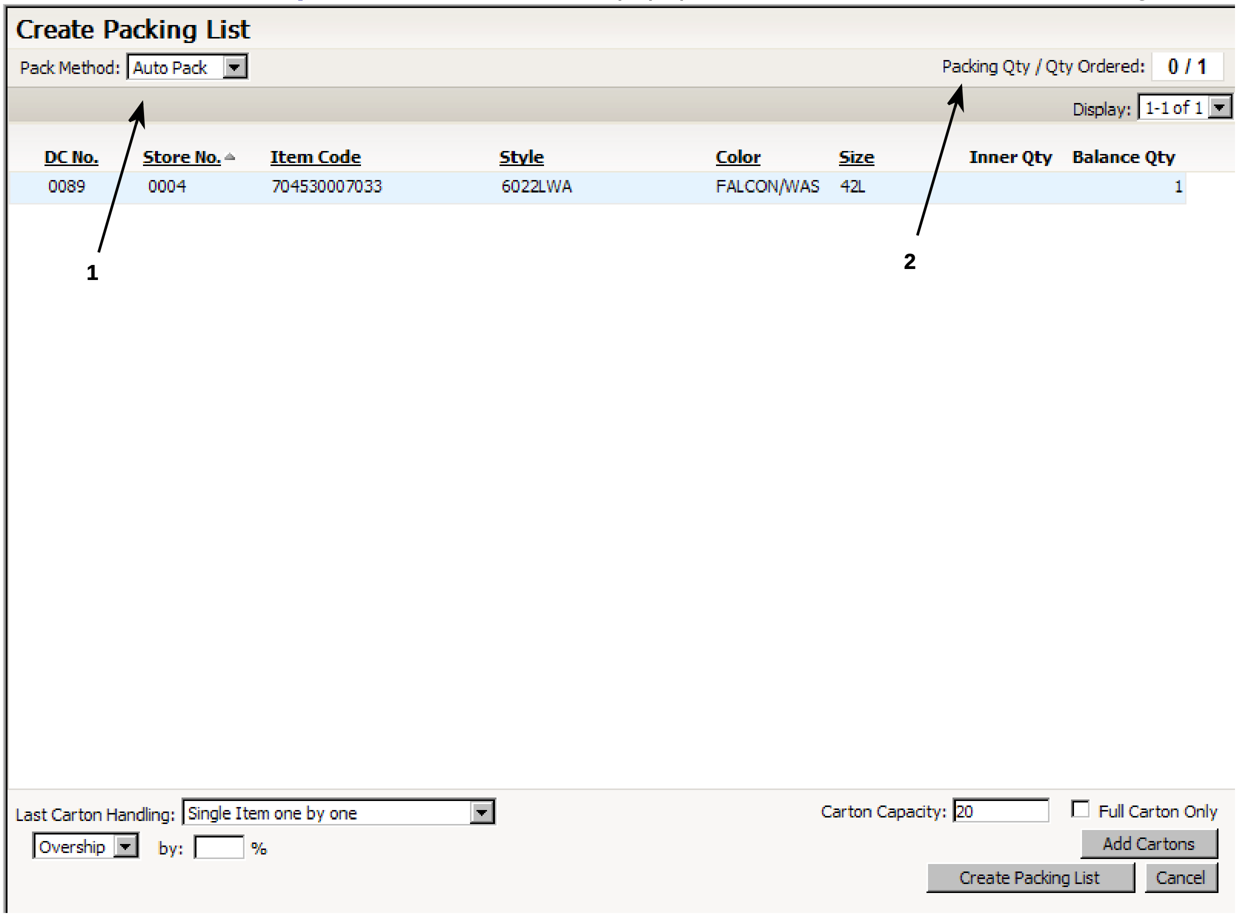
   The **Shipping** tab **Customer Orders** page opens.

   **Note:** The **Shipping** tab **Customer Orders** list displays different Order data than the **Customer Orders** list in the **Order** and **Finance** tabs, which are the same.

2. Click **Create Packing List** in the row of the customer Order you wish to pack.

The **Create Packing List** dialog box opens. It displays information from the Order.

**Important:** You must have popup blockers turned off to see the dialog box.




**1** Select a pack method.

**2** The **Packing Qty/Order Qty** box at the upper right of the page provides a running count of your pack quantity to the quantity ordered.

3 In the **Pack Method** list, select the packing method you wish to use, then continue by using the procedure for that method:

- **Auto Pack**—OpenText Vendor Portal automatically packs cartons for you. This is the default setting and often the best for simple Orders.

  Go to either “To use Auto Pack for Pick and Pack or Standard Pack ASNs” on page 46 or “To use Auto Pack for No Pack ASNs” on page 50, depending on the type of ASN.

- **Partial Pack**—Use this method to specify items and quantities to pack, and/or to pack only for a specific DC.

  Go to “To pack using Partial Pack” on page 51.

- **Ratio Pack**—Use this method to pack specific items and quantities by a ratio in individual cartons, and/or to pack only for a specific DC.

  Go to “To pack using Ratio Pack” on page 55.

- **Split Pack**—Use this method to pack an item that ships in multiple cartons, such as an item with multiple components that are assembled later.

  Go to “To use the split pack method” on page 58.

## Packing with Auto Pack

Use one of the following procedures to pack using the Auto Pack method:

- “To use Auto Pack for Pick and Pack or Standard Pack ASNs” on page 46
- “To use Auto Pack for No Pack ASNs” on page 50

### To use Auto Pack for Pick and Pack or Standard Pack ASNs

**Note:** Use the steps required to pack your shipment. Often, not all steps are required.

1 See “To create a packing list” on page 44.

2 In the **Pack Method** list in the **Create Packing List** dialog box, leave **Auto Pack** selected.

The dialog box displays a list of rows for each combination of **DC Number, Store Number, Item Code, Style, Color,** and **Size** in the PO. The **Balance Qty** column displays the quantity that remains to pack for each row.

**Create Packing List**

Pack Method: Auto Pack

Packing Qty / Qty Ordered: 0 / 677

Display: 1-30 of 350

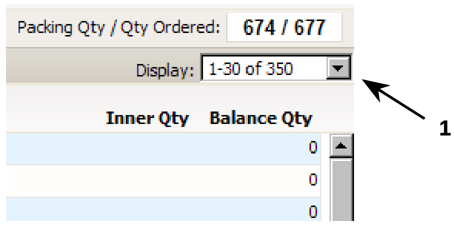
| DC No. | Store No. | Item Code | Style | Color | Size | Inner Qty | Balance Qty |
|---|---|---|---|---|---|---|---|
| 0299 | 0720 | 843437115981 | MT617EE | PURPLEFOAM | SMALL | | 1 |
| 0299 | 0720 | 843437115998 | MT617EE | PURPLEFOAM | MEDIUM | | 2 |
| 0299 | 0720 | 843437116001 | MT617EE | PURPLEFOAM | LARGE | | 2 |
| 0299 | 0720 | 843437116018 | MT617EE | PURPLEFOAM | X LARGE | | 2 |
| 0299 | 0720 | 843437116025 | MT617EE | PURPLEFOAM | XX LARGE | | 1 |
| 0299 | 0720 | 843437116230 | MT620MW | GRANITSOIL | SMALL | | 1 |
| 0299 | 0720 | 843437116247 | MT620MW | GRANITSOIL | MEDIUM | | 2 |
| 0299 | 0720 | 843437116254 | MT620MW | GRANITSOIL | LARGE | | 2 |
| 0299 | 0720 | 843437116261 | MT620MW | GRANITSOIL | X LARGE | | 2 |

3 Use the following options to revise the list to make it easier to pack:

- If you want to group rows by **Store Number, Item Code, Style, Color,** or **Size**, click that column header to reset the list. (To return to sorting the list by DC No., click the **DC No.** column header.)

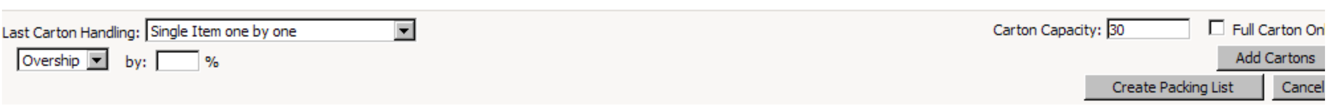
- If you want to view an hidden section of the list, in the **Display** list select that section of the list—for example, select 26-48 to view rows 26 through 48 in the list.

  **Note:** To increase the maximum number of rows that display on a page, see "Changing the Maximum Number of Rows that Display" on page 112.




**1** In **Display**, select a section of the list to view.

The Auto Pack configuration area is at the bottom of the page.




4. In the **Last Carton Handling** list at the bottom left, select how to pack remaining quantities of an item code after fully packing other cartons with the item.

   For details, see "Using the Last Carton Handling Options" on page 63.

5. In the **Carton Capacity** field at the bottom right of the page, type the maximum quantity of items (eaches) to pack in each carton.

   **Note:** If the shipment contains inner packs, make sure the **Carton Capacity** value is at least as large as the Inner Pack size—for example, 6 eaches. Otherwise, Auto Pack will pack only the items that are not in inner packs larger than the **Carton Capacity**. In other words, Vendor Portal will not fully pack the shipment.

6. If you want to pack full cartons for the Order, click the **Full Carton Only** check box at the bottom right to place a check mark in it. If you select this option, you may have extra, unpacked items.

   **Note:** After you create the packing list, you can add partial cartons to it by adding cartons to the packing list. See "Adding Cartons to a Packing List" on page 71. Another option is to use Ratio Pack. See "To pack using Ratio Pack" on page 55.

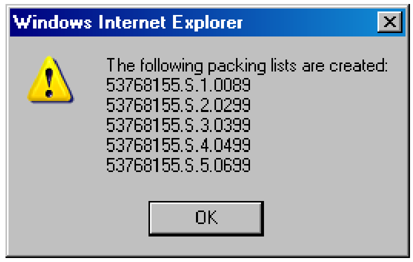
   If you do not select this option, Vendor Portal will pack all items that you select later in this procedure.

7. To ship a greater or lesser quantity of an item than the quantity ordered, select either **Overship** or **Shortship** in the list at the bottom left, and then specify a percentage in the % field next to the list.

   Vendor Portal will include allowed additional or reduced quantities in the packing list.

8. To pack the Order, in the **Create Packing List** dialog box click **Create Packing List**.

If the PO contains multiple DCs, Vendor Portal will create a packing list for each DC and display a message like the one below.



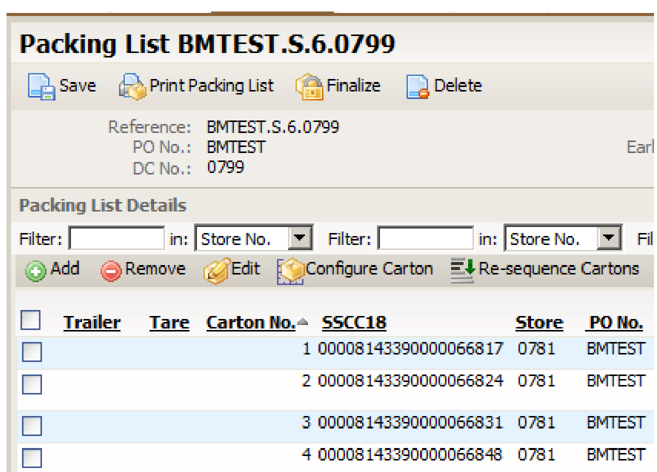

The first characters in the Packing List Number are the PO Number, and the final characters are the DC number for the shipment. In the example above, the PO includes items for five different DCs. Therefore, Vendor Portal creates five different packing lists.

**Note:** You might want to write down the packing list numbers, or save a screenshot of the message.

9 Click **OK** in the message box.

The **Create Packing List** dialog box closes, and the following occurs:

- Vendor Portal creates and packs the cartons.
- The **Packing List** page updates to display the packing list, or the first packing list if Vendor Portal created more than one. The packing list includes a list of cartons and unique SSCC18 carton numbers, as shown below.




**Note:** OpenText Vendor Portal generates container numbers using the vendor company Block ID number and stored sequence number. See also "Carton Sequence in Vendor Portal" on page 62.

- The **Qty Packed / Qty Ordered** totals in the upper right corner of the **Packing List** page update to display the quantity packed for the packing list on screen, and the total quantity ordered.

  Qty Packed / Qty Ordered: 232 / 1,440

  **Note:** If multiple packing lists exist for a PO, the Order might be fully packed even though the Qty Packed value is less than the Qty Ordered. Remember that the Qty Packed amount is only for this packing list, not for all packing lists generated for the PO.

- Vendor Portal creates GS1-128 labels based on the criteria selected. In the example below, for Store Number 0014 with a total of 24 items in the shipment, Vendor Portal will creates three labels—two with a quantity of 10 and one with the remaining balance of 4.

| SSCC18 | Store | PO No. | Style | Description | Color | Size | Qty Packed |
|---|---|---|---|---|---|---|---|
| 000081433900000005724 | 0014 | INVPO006 | LJ-3,U-1 | | NAVY | M,S,XL | 10 |
| 000081433900000005731 | 0014 | INVPO006 | LJ-3,U-1 | | NAVY | L,M | 10 |
| 000081433900000005748 | 0014 | INVPO006 | U-1 | | NAVY | L | 4 |

**10** If you wish to edit an individual carton, click the check box in the carton row on the **Packing List** page, then click **Edit**.

The **Edit Carton** dialog box opens. For a description of how to use this dialog box to edit a carton, see “To edit cartons in a packing list” on page 70.

**11** If you wish to delete a carton, click the check box in the row of a carton you wish to delete, then click **Delete**.

**Note:** You can select multiple cartons to delete in one action.

**12** After packing, click **Save** to save the packing list.

**Note:** To edit the packing list now or later, see “Updating and Amending Packing Lists” on page 67.

**13** If you are not using default carton dimensions and weights, see “To configure carton dimensions and weight” on page 64 to configure your cartons.

**Note:** To set default carton dimensions and weights that OpenText Vendor Portal will automatically apply to packing lists for specified buyers, see “Working with Saved Carton Settings” on page 65.

**14** To complete the packing list, which is required before you can print shipping labels and create an Advance Ship Notice, click **Finalize** in the packing list.

After you finalize, the page resets to display icons that enable you to print labels and create an ASN or amend the packing list as described in the following procedures:

- “Printing Shipping Labels” on page 76
- “Creating ASNs” on page 84.
- “Amending Packing Lists in Final Status” on page 73

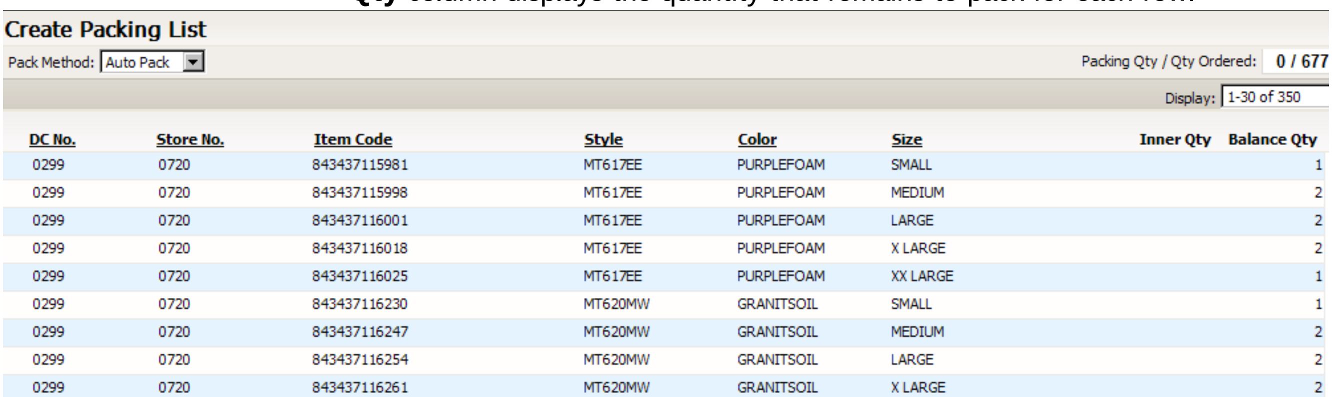
The status of the packing list changes to Final on the **Packing List** page.

### To use Auto Pack for No Pack ASNs

**Note:** In OpenText Vendor Portal, if you intend to send an ASN that uses No Pack format, you must still create a temporary, virtual container when you create the packing list. It will be discarded when you create the No Pack ASN.

1. See "To create a packing list" on page 44.
2. In the **Pack Method** list in the **Create Packing List** dialog box, leave **Auto Pack** selected.

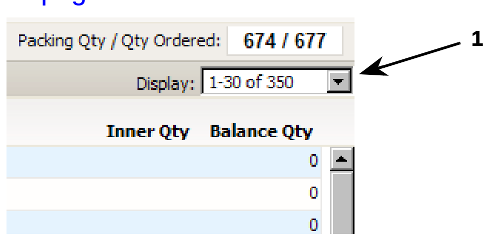
   The dialog box displays a list of rows for each combination of **DC Number, Store Number, Item Code, Style, Color,** and **Size** in the PO. The **Balance Qty** column displays the quantity that remains to pack for each row.


Create Packing List
Pack Method: Auto Pack
Packing Qty / Qty Ordered: 0 / 677
Display: 1-30 of 350

| DC No. | Store No. | Item Code | Style | Color | Size | Inner Qty | Balance Qty |
|---|---|---|---|---|---|---|---|
| 0299 | 0720 | 843437115981 | MT617EE | PURPLEFOAM | SMALL | | 1 |
| 0299 | 0720 | 843437115998 | MT617EE | PURPLEFOAM | MEDIUM | | 2 |
| 0299 | 0720 | 843437116001 | MT617EE | PURPLEFOAM | LARGE | | 2 |
| 0299 | 0720 | 843437116018 | MT617EE | PURPLEFOAM | X LARGE | | 2 |
| 0299 | 0720 | 843437116025 | MT617EE | PURPLEFOAM | XX LARGE | | 1 |
| 0299 | 0720 | 843437116230 | MT620MW | GRANITSOIL | SMALL | | 1 |
| 0299 | 0720 | 843437116247 | MT620MW | GRANITSOIL | MEDIUM | | 2 |
| 0299 | 0720 | 843437116254 | MT620MW | GRANITSOIL | LARGE | | 2 |
| 0299 | 0720 | 843437116261 | MT620MW | GRANITSOIL | X LARGE | | 2 |

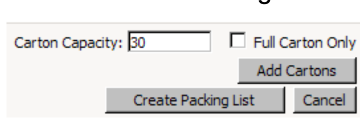
3. Use the following options as needed to make the list easier to view:
   - If you want the list to group items by **Store Number, Item Code, Style, Color,** or **Size**, click that column header to reset the list. (To return to sorting the list by DC No., click the **DC No.** column header.)
   - If you want to view a hidden section of the list, in the **Display** list select that section of the list—for example, select 26-48 to view rows 26 through 48 in the list.

     **Note:** To increase the maximum number of rows that display on a page, see "Changing the Maximum Number of Rows that Display" on page 112.




**1** In **Display**, select a section of the list to view.

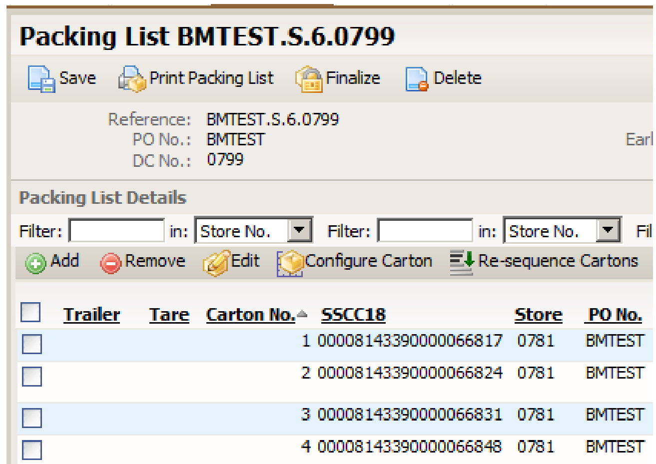
The Auto Pack configuration area is at the bottom of the page.




4. In the **Carton Capacity** field at the bottom right, type a quantity of items (eaches) larger than the actual quantity of items you will ship.

**5** Click **Create Packing List**.

The **Create Packing List** dialog box closes and the application creates and packs the carton for you.




**6** After packing, click **Save** to save the packing list.

**Note:** To edit the packing list now or later, see “Updating and Amending Packing Lists” on page 67.

**7** To complete the packing list, which is required before you can print shipping labels and create an Advance Ship Notice, click **Finalize** in the packing list.

After you finalize, the page resets to display icons that enable you to print labels and create an ASN or amend the packing list as described in the following procedures:

- “Printing Shipping Labels” on page 76
- “Creating ASNs” on page 84.
- “Amending Packing Lists in Final Status” on page 73

The status of the packing list changes to Final on the **Packing List** page.

## Packing with Partial Pack

Use this procedure to pack using the Partial Pack method.

### To pack using Partial Pack

**1** See “To create a packing list” on page 44.

**2** In the **Pack Method** list in the **Create Packing List** dialog box, select **Partial Pack**.

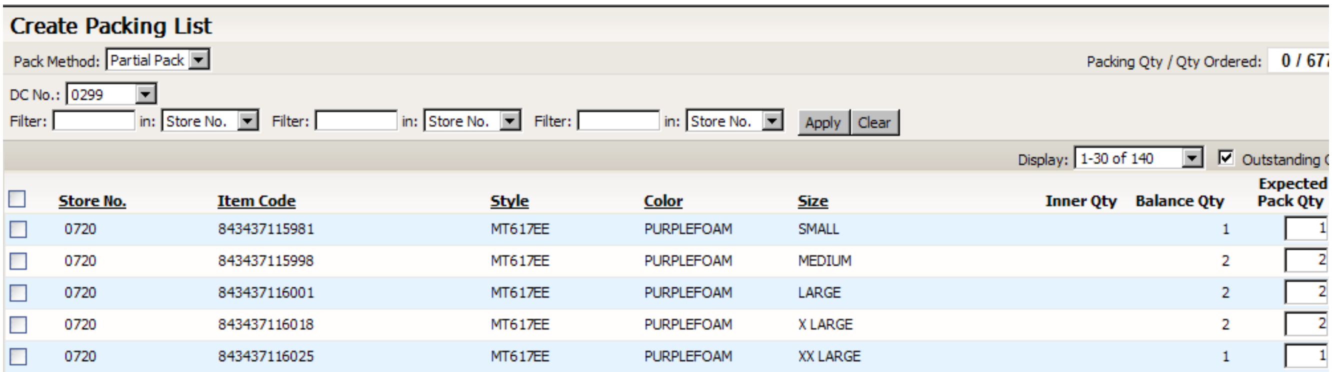
The dialog box resets. No items display yet.

**3** In the **DC No.** list near the top left, select the DC you want to pack items for.

The dialog box resets to display a list of the following:

- Rows for each combination of Store Number, Item Code, Style, Color, and Size in the PO.
- Check boxes for each row to select which items to pack.

- Expected Pack Qty field for each row. You can edit the value pulled from the PO.




4 Use the following options to revise the list to make it easier to pack:

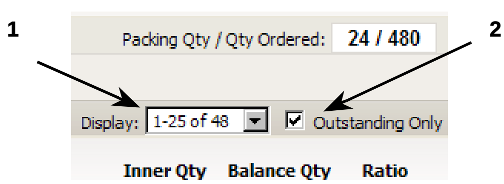
- If you want to view only items for a specific Store Number, Style, Size, Color, or Item Code, use the **Filter** bar above the list. This is useful to pack for one store at a time, for example.

  For details, see "Filtering a List of Items when Packing" on page 61.

- If you want the list to group items by **Item Code, Style, Color,** or **Size**, click that column header to reset the list. (To return to sorting the list by Store No., click the **Store No.** column header.)

- If you want to display only items with balances remaining to be packed, click the **Outstanding Only** check box in the top right to place a check mark in it.

  To display all items in the shipment, including those already packed, click the check box to remove the check mark.



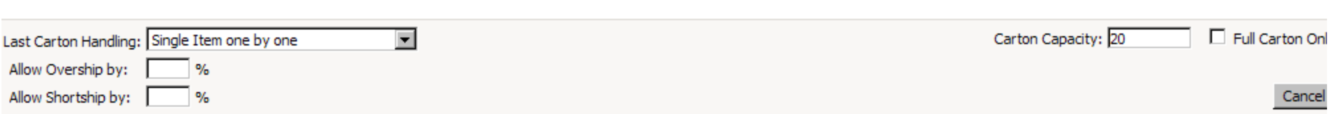

1 In **Display**, select a section of the list to view.

2 Check or uncheck the **Outstanding Only** check box.

- If you want to view a hidden section of the list, in the **Display** list select that section of the list—for example, select 26-48 to view rows 26 through 48 in the list.

  **Note:** To increase the maximum number of rows that display on a page, see "Changing the Maximum Number of Rows that Display" on page 112.

The **Partial Pack** configuration area is at the bottom of the page.



5 Select a packing preference in the **Last Carton Handling** list at the bottom left. For details, see "Using the Last Carton Handling Options" on page 63.

6 In the **Carton Capacity** field at the bottom right of the page, type the maximum quantity of items (eaches) to pack in each carton.

**Note:** If the shipment contains inner packs, make sure the **Carton Capacity** value is at least as large as the **Inner Pack** size—for example, 6 eaches. Otherwise, Vendor Portal will pack only the items that are not in inner packs larger than the **Carton Capacity**.

7 To pack only full cartons for the Order, click the **Full Carton Only** check box at the bottom right to place a check mark in it. If you select this option, you may have extra, unpacked items.

**Note:** To fill the Order you must manually pack any remaining items that do not fill a single carton. For one way to do this, see "Adding Cartons to a Packing List" on page 71 or "To pack using Ratio Pack" on page 55.

If you do not select the **Full Carton Only** option, Vendor Portal will pack all items that you select later in this procedure.

8 To ship a greater or lesser quantity of an item than the quantity ordered, in the **Allow Overship** and/or **Allow Shortship** fields, specify the percentage of overship or shortship to allow.

When Vendor Portal packs the cartons, it will use these values as an allowance amount when it validates the Expected Pack Qty for each item (see below).

9 To select items to pack, click the check box in the row of an item to place a check mark in the box. To select all items for all stores, click the check box in the header row.

**Note:** To pack all items only for a single store, first filter the list by Store No., then select the check box in the header row to select all items for that store. For details, see "To filter a list of items when packing" on page 61.

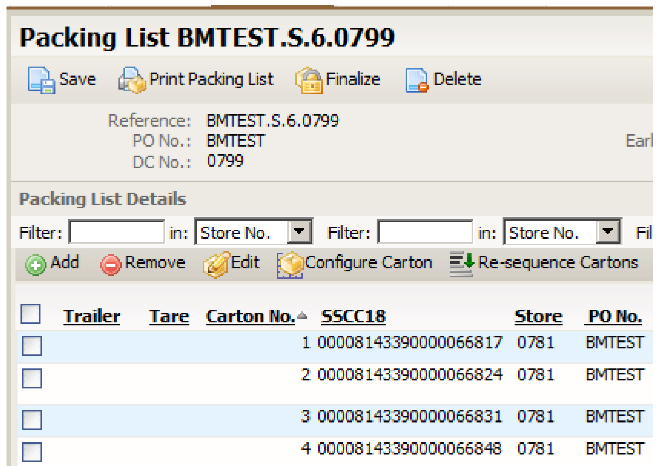
To select most but not all rows, first click the check box in the header row to select all, then click the check boxes for the specific rows to not pack to uncheck them.

10 In the **Expected Pack Qty** column, edit the item quantities that you wish to pack in the shipment.

11 To pack the Order using the specifications you have entered, click **Create Packing List**.

The **Create Packing List** dialog box closes and the **Packing List** page updates to display a list of cartons and a unique shipping container number for each carton, as shown below.

**Note:** OpenText Vendor Portal generates SSCC18 carton numbers using the vendor company Block ID number and stored sequence number. See also "Carton Sequence in Vendor Portal" on page 62.




**Note:** The **Qty Packed / Qty Ordered** totals in the upper right corner of the **Packing List** page update to display the quantity packed in the packing list for this DC in the Order.

**12** If you wish to edit an individual carton, click the check box in the carton row on the **Packing List** page, then click **Edit**.

The **Edit Carton** dialog box opens. For a description of how to use this dialog box to edit a carton, see "To edit cartons in a packing list" on page 70.

**13** If you wish to delete a carton, click the check box in the row of a carton you wish to delete, then click **Delete**.

**Note:** You can select multiple cartons to delete in one action.

**14** If you are not using default carton dimensions and weights, see "To configure carton dimensions and weight" on page 64 to configure your cartons.

**Note:** To set default carton dimensions and weights that OpenText Vendor Portal will automatically apply to packing lists for specified buyers, see "Working with Saved Carton Settings" on page 65.

**15** After packing, click **Save** to save the packing list.

**Note:** To edit the packing list now or later, see "Updating and Amending Packing Lists" on page 67.

**16** To complete the packing list, which is required before you can print shipping labels and create an Advance Ship Notice, click **Finalize** in the packing list.

After you finalize, the page resets to display icons that enable you to print labels and create an ASN or amend the packing list as described in the following procedures:

- "Printing Shipping Labels" on page 76
- "Creating ASNs" on page 84.

- "Amending Packing Lists in Final Status" on page 73

The status of the packing list changes to Final on the **Packing List** page.

## Packing with Ratio Pack

Use this procedure to pack using the Ratio Pack method.

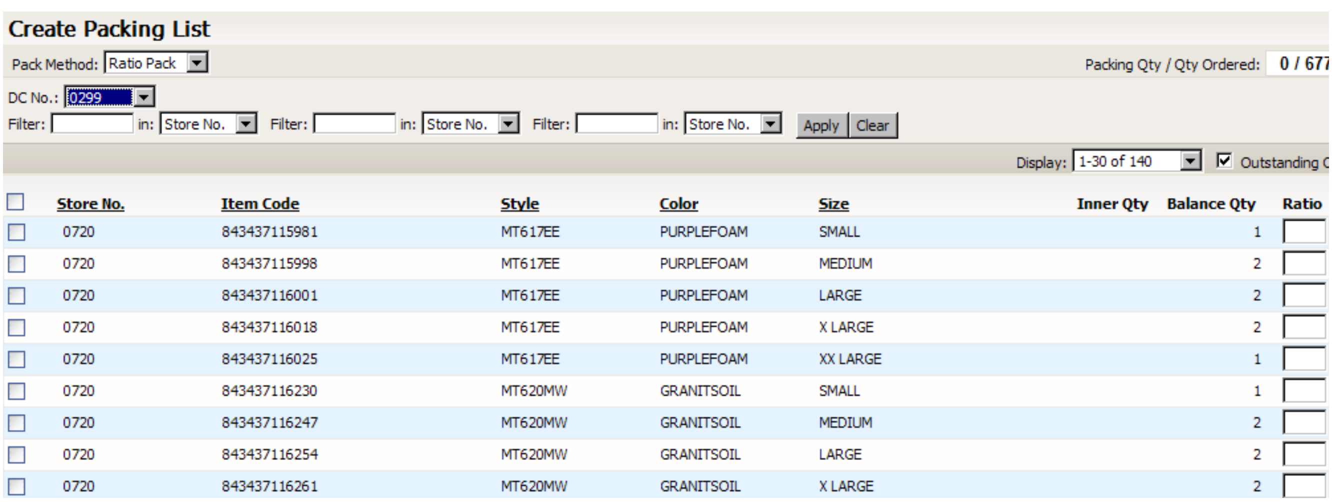
### To pack using Ratio Pack

1. See "To create a packing list" on page 44.
2. In the **Pack Method** list in the **Create Packing List** dialog box, select **Ratio Pack**.

   The dialog box resets. No items display yet.
3. In the **DC No.** list near the top left, select the DC you want to pack items for.

   The dialog box resets to display a list of the following:

   - Rows for each combination of Store Number, Item Code, Style, Color, and Size in the PO.
   - Check boxes for each row to select which items to pack.
   - Ratio field for each row.

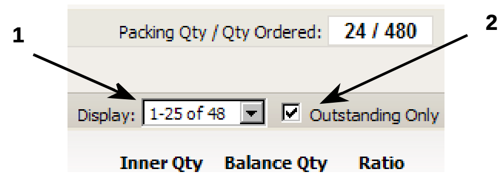



| | Store No. | Item Code | Style | Color | Size | Inner Qty | Balance Qty | Ratio |
|---|---|---|---|---|---|---|---|---|
| | 0720 | 843437115981 | MT617EE | PURPLEFOAM | SMALL | | 1 | |
| | 0720 | 843437115998 | MT617EE | PURPLEFOAM | MEDIUM | | 2 | |
| | 0720 | 843437116001 | MT617EE | PURPLEFOAM | LARGE | | 2 | |
| | 0720 | 843437116018 | MT617EE | PURPLEFOAM | X LARGE | | 2 | |
| | 0720 | 843437116025 | MT617EE | PURPLEFOAM | XX LARGE | | 1 | |
| | 0720 | 843437116230 | MT620MW | GRANITSOIL | SMALL | | 1 | |
| | 0720 | 843437116247 | MT620MW | GRANITSOIL | MEDIUM | | 2 | |
| | 0720 | 843437116254 | MT620MW | GRANITSOIL | LARGE | | 2 | |
| | 0720 | 843437116261 | MT620MW | GRANITSOIL | X LARGE | | 2 | |

4. Use the following options to revise the list to make it easier to pack:
   - If you want to view only items for a specific Store Number, Style, Size, Color, or Item Code, use the filter bar above the list. This is useful to pack for one store at a time, for example.

     For details, see "To filter a list of items when packing" on page 61.
   - If you want the list to group items by **Item Code, Style, Color,** or **Size**, click that column header to reset the list. (To return to sorting the list by Store No., click the **Store No.** column header.)
   - If you want to display only items with balances remaining to be packed, click the **Outstanding Only** check box in the top right to place a check mark in it.

To display all items in the shipment, including those already packed, click the check box to remove the check mark.



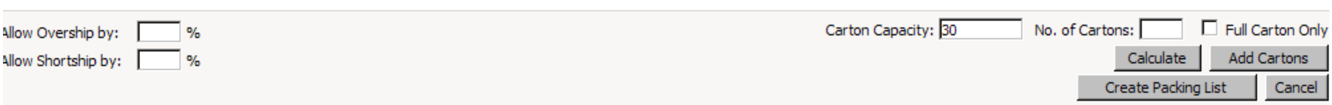

1 In **Display**, select a section of the list to view.

2 Check or uncheck the **Outstanding Only** check box.

- If you want to view a hidden section of the list, in the **Display** list select that section of the list—for example, select 26-48 to view rows 26 through 48 in the list.

  **Note:** To increase the maximum number of rows that display on a page, see “Changing the Maximum Number of Rows that Display” on page 112.

The Ratio Pack configuration area is at the bottom of the page.




**5** In the **Carton Capacity** field at the bottom right of the page, type the maximum quantity of items (eaches) to pack in each carton.

**Note:** If the shipment contains inner packs, make sure the **Carton Capacity** value is at least as large as the Inner Pack size—for example, 6 eaches. Otherwise, Vendor Portal will pack only the items that are not in inner packs larger than the **Carton Capacity**.

**6** To pack only full cartons for the Order, click the **Full Carton Only** check box at the bottom right to place a check mark in it. If you select this option, you may have extra, unpacked items.

If you do not select this option, Vendor Portal will pack all items that you select later in this procedure.

**7** To ship a greater or lesser quantity of an item than the quantity ordered, in the **Allow Overship** and/or **Allow Shortship** fields, specify the percentage of overship or shortship to allow.

Vendor Portal will automatically include the allowed additional or reduced quantities in the packing list.

**8** To select items to pack, click the check box in the row of an item to place a check mark in the box. To select all items for all stores, click the check box in the header row.

**Note:** To pack all items only for a single store, first filter the list by Store No., then select the check box in the header row to select all items for that store. For details, see “To filter a list of items when packing” on page 61.

To select most but not all rows, first click the check box in the header row to select all, then click the check boxes for the specific rows to not pack to uncheck them.

**9** In the **Ratio** column, for each item you are packing type the ratio number to use to determine the items and/or quantities of items to pack into cartons. The Ratio sets the formula for distributing items among cartons.

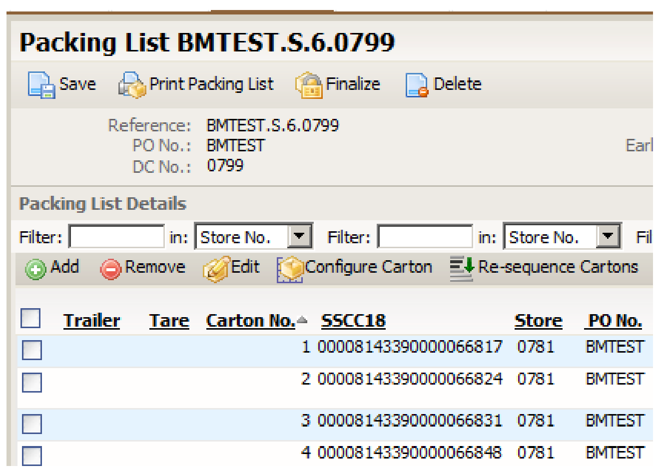
For example, if you have three items, you could type 10 in the **Ratio** field for each item. If your **Carton Capacity** is 30, then the application will pack 10 of each of the three items in each carton and create as many cartons as necessary to fill the **Balance Qty** amounts using the ratio provided.

**10** Under the **No. of Cartons** field at the bottom right, click **Calculate** to populate the **No. of Cartons** field using the current **Balance Qty**, **Carton Capacity**, and **Ratio**.

**11** To pack the Order using the specifications you have entered, click **Create Packing List**.

The **Create Packing List** dialog box closes and the **Packing List** page updates to display a list of cartons and a unique shipping container number for each carton, as shown below.

**Note:** OpenText Vendor Portal generates SSCC18 carton numbers using the vendor company Block ID number and stored sequence number. See also “Carton Sequence in Vendor Portal” on page 62.




**Note:** The **Qty Packed / Qty Ordered** totals in the upper right corner of the **Packing List** page update to display the quantity packed in the packing list for this DC in the Order.

**12** If you wish to edit an individual carton, click the check box in the carton row on the **Packing List** page, then click **Edit**.

The **Edit Carton** dialog box opens. For a description of how to use this dialog box to edit a carton, see “To edit cartons in a packing list” on page 70.

**13** If you wish to delete a carton, click the check box in the row of a carton you wish to delete, then click **Delete**.

**Note:** You can select multiple cartons to delete in one action.

**14** After packing, click **Save** to save the packing list.

**Note:** To edit the packing list now or later, see “Updating and Amending Packing Lists” on page 67.

**15** If you are not using default carton dimensions and weights, see "To configure carton dimensions and weight" on page 64 to configure your cartons.

**Note:** To set default carton dimensions and weights that OpenText Vendor Portal will automatically apply to packing lists for specified buyers, see "Working with Saved Carton Settings" on page 65.

**16** To complete the packing list, which is required before you can print shipping labels and create an Advance Ship Notice, click **Finalize** in the packing list.

After you finalize, the page resets to display icons that enable you to print labels and create an ASN or amend the packing list as described in the following procedures:

- "Printing Shipping Labels" on page 76
- "Creating ASNs" on page 84.
- "Amending Packing Lists in Final Status" on page 73

The status of the packing list changes to Final on the **Packing List** page.

## Packing with Split Pack

Use this procedure to use the Split Pack method to pack a single item with multiple components that ships in multiple cartons.

**Important:**

- Not all retailer programs support this feature.
- You must follow your retailer's guidelines for creating split shipments.
- Split shipments pack one component per carton. Use as many cartons per item as needed to pack all of the components per item.
- Be aware that OpenText Vendor Portal allows you to split an item into multiple cartons even if the item cannot actually be split into multiple cartons. Therefore, make sure an item can be split into multiple cartons, and how many cartons are required per item, before using this procedure.
- Usually, you will split pack only one item at a time, which creates a single packing list that contains only that item. However, OpenText Vendor Portal allows you to split pack multiple items in one action. If you do this, make sure that each item should ship together, and that each item requires the same number of cartons. The packing list will include all selected. items.

### To use the split pack method

**1** See "To create a packing list" on page 44.

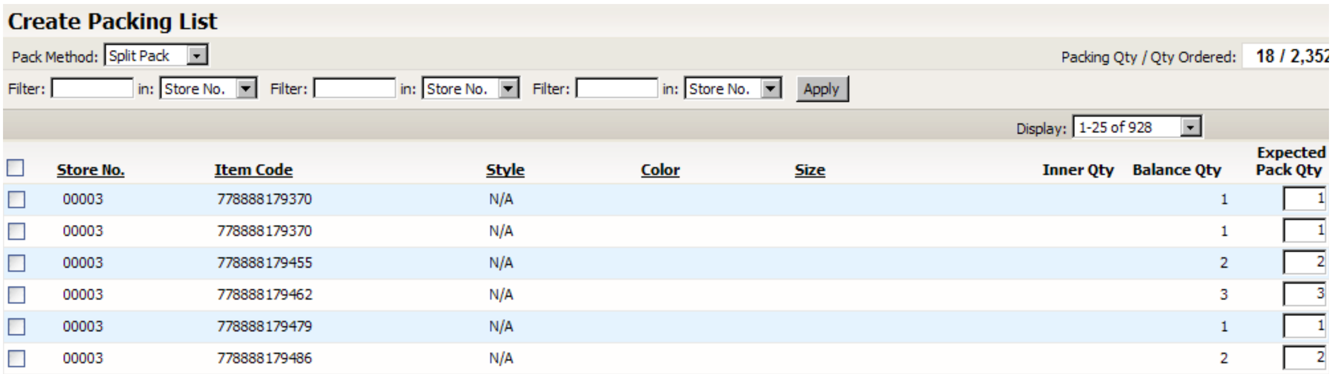
**2** In the **Pack Method** list in the **Create Packing List** dialog box, select **Split Pack**.

You may also be able to select a DC to create the packing list for.

The dialog box resets to display a list of the following:

- Rows for each combination of Store Number, Item Code, Style, Color, and Size in the PO.
- Check boxes for each row to select which items to pack.

- **Expected Pack Qty** field for each row. You can edit the value pulled from the PO.




**3** Use the following options to revise the list to make it easier to pack:

- If you want to view only items for a specific Store Number, Style, Size, Color, or Item Code, use the **Filter** bar above the list. This is useful to pack for one store at a time, for example.

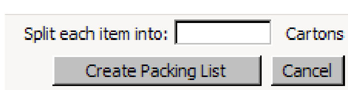
  For details, see "To filter a list of items when packing" on page 61.

- If you want the list to group items by **Item Code, Style, Color,** or **Size**, click that column header to reset the list. (To return to sorting the list by Store No., click the **Store No.** column header.)

- If you want to view a hidden section of the list, in the **Display** list select that section of the list—for example, select 26-48 to view rows 26 through 48 in the list.

  **Note:** To increase the maximum number of rows that display on a page, see "Changing the Maximum Number of Rows that Display" on page 112.

The Split Pack configuration area is at the bottom of the page.




**4** In the **Split each item into ___ Cartons** field, type the number of cartons to create for each item.

For example, if the item includes three components that each ship in a separate carton, type "3" in the field.

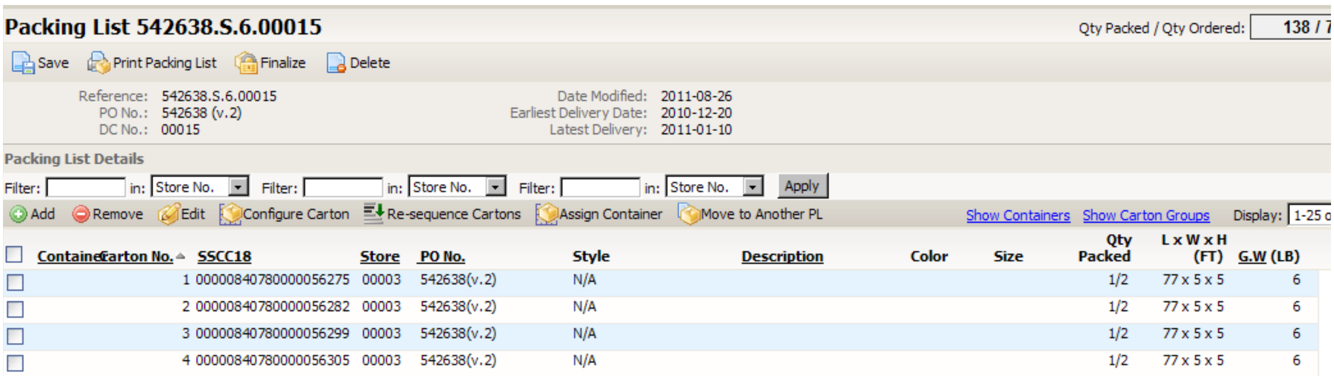
**5** Click the check box in the row of the item you want to split pack. A check mark displays.

**Important:** You can select more than one item, but do this only if the selected items pack into the same number of cartons. See previous step.

**6** In the **Expected Pack Qty** column, if needed, edit the item quantities to pack in the shipment.

**7** To pack the Order using the specifications you have entered, click **Create Packing List**.

The **Create Packing List** dialog box closes and the **Packing List** page updates to display a list of cartons and unique SSCC18 carton numbers, as shown below.




**Note:**

- **Qty Pack** column indicates the number of components packed in the carton, and the total number of component cartons packed for each item. For example, 1/2 indicates the carton contains one component, and the items ships as two cartons/components.
- **Qty Packed / Qty Ordered** totals in the upper right corner of the **Packing List** page update to display the quantity packed in the packing list for this DC in the Order.
- OpenText Vendor Portal generates SSCC18 carton numbers using the vendor company Block ID number and stored sequence number. See also "Carton Sequence in Vendor Portal" on page 62.
- To see the number of cartons per item, at right above the list click **Show Carton Groups**. The list includes the range of cartons for each item code (for example, UPC).

**8** To edit an individual carton, click the check box in the carton row on the **Packing List** page, then click **Edit**.

The **Edit Carton** dialog box opens. For a description of how to use this dialog box to edit a carton, see "To edit cartons in a packing list" on page 70.

**9** If you wish to delete a carton, click the check box in the row of a carton you wish to delete, then click **Delete**.

**Note:** You can select multiple cartons to delete in one action.

**10** If you are not using default carton dimensions and weights, see "To configure carton dimensions and weight" on page 64 to configure your cartons.

**Note:** To set default carton dimensions and weights that OpenText Vendor Portal will automatically apply to packing lists for specified buyers, see "Working with Saved Carton Settings" on page 65.

**11** After packing, click **Save** to save the packing list.

**Note:** To edit the packing list now or later, see "Updating and Amending Packing Lists" on page 67.

**12** To complete the packing list, which is required before you can print shipping labels and create an Advance Ship Notice, click **Finalize** in the packing list.

After you finalize, the page resets to display icons that enable you to print labels and create an ASN or amend the packing list as described in the following procedures:

- "Printing Shipping Labels" on page 76
- "Creating ASNs" on page 84.
- "Amending Packing Lists in Final Status" on page 73

The status of the packing list changes to Final on the **Packing List** page.

13 If you have other items that ship in multiple cartons, repeat this procedure for those items.

## Filtering a List of Items when Packing

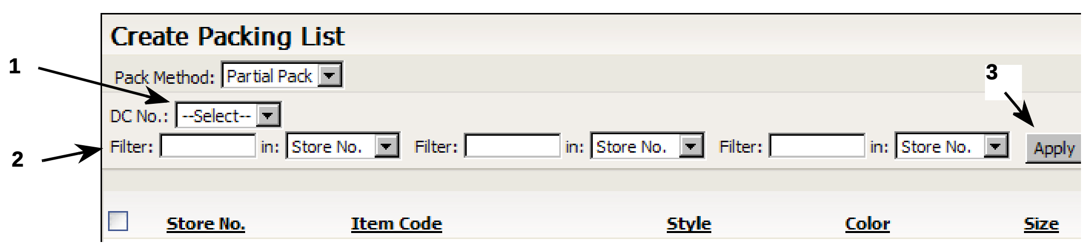
In the Partial Pack, Ratio Pack, and Split Pack packing methods, use the following procedure to filter a long list of items in the **Create Packing List** dialog box. This enables you to pack items more easily, such as to pack items for one store at a time.

For example, use the **Filter** to display only items for a single store and/or Color or Size, then pack those items.

### To filter a list of items when packing

1 In the **Create Packing List** dialog box, in the **Pack Method** list, select either **Partial Pack** or **Ratio Pack**.

The dialog box refreshes and displays the filter bar. No items display yet.




| | |
|---|---|
| **1** | Before using the **Filter** bar, select a DC in the **DC No.** list. |
| **2** | Use the **Filter** bar to restrict the list of items. |
| **3** | Click **Apply** to apply the filter to the list of items. |

2 (Partial and Ratio Pack only) In the **DC No.** list, select a DC to show only items for that DC.

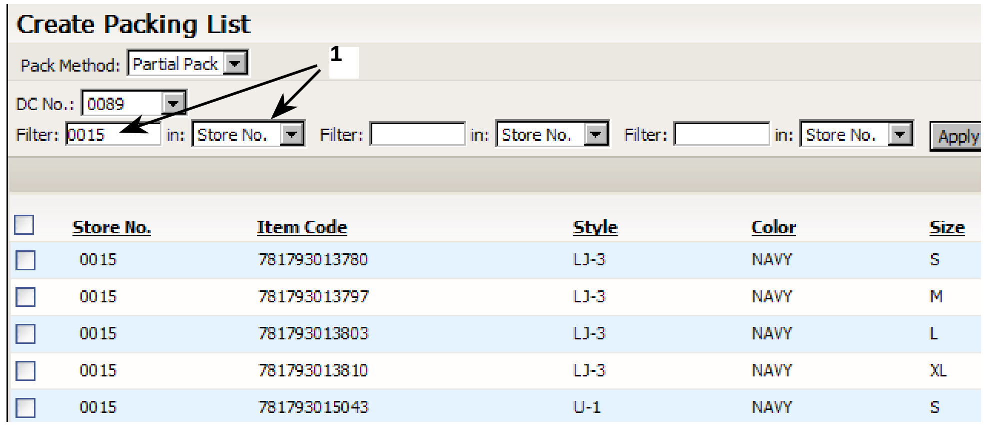
The dialog box displays a list of items in the PO for the selected DC.

3 Filter the list by using the three pairs of **Filter** inputs below the **DC No.** list.

Each pair is a combination of a **Filter** field and a list of categories of item data, such as **Store No.**, **Item Code**, and **Size**. The categories are the same as the first five columns in the **Create Packing List** dialog box.

You can use one, two, or three filters to restrict the list of items.

For example, select **Store No.** in the first list, and type a specific Store No. in the **Filter** field to the left, as shown below: Filter 0015 in Store. No.




**1** Choose a filter category in the list, and in the **Filter** field type a value for that category.

4. Click **Apply** to apply the filter to the list of items.

   In the example above, the list of items resets to show only items for Store No. 0015.

5. To restrict the list further, add a second filter. For example, to show only items of a specific Size, use the second pair of filter inputs the same way as described above. Select **Size** in the list, and type a specific size in the **Filter** field to the left of the list.

   You can add a third filter in the same way.

To remove the filter, click **Clear**.

## Carton Sequence in Vendor Portal

OpenText Vendor Portal generates SSCC-18 carton numbers in all three packing methods. It uses your company's Block ID and a stored sequence number. Vendor Portal uses the following order of priority to sequence cartons:

1. Fully packed cartons containing a single item code.
2. Store Number when more than one Store Number exists in the packing list.

   **Note:** Cartons containing the same item code do not necessarily follow each other when they are for different stores. Within a store, however, cartons containing the same item code do follow each other.

3. Fully packed cartons containing multiple item codes when the **Last Carton Handling** selection allows multiple item codes in a carton.
4. Partially packed cartons.

Vendor Portal uses the highest level of priority that applies to a carton. For example, a partially packed carton (#4) for a low Store Number (#2) will precede a fully packed carton containing multiple item codes (#3) for a high Store Number. This is because the highest level of priority that applies to these two cartons is Store Number (#2), which gives priority to the partially packed carton.

You can edit the row number that determines where a carton displays in a list in Vendor Portal, but you cannot edit the SSCC-18 number itself. For details, see the following:

- To begin carton row numbering with a number other than 1, see "Re-numbering a List of Cartons" on page 74.
- To change an individual carton row number, see "Editing Cartons in a Packing List" on page 70.

## Using the Last Carton Handling Options

The section describes the packing options in the **Last Carton Handling** list list in Auto Pack and Partial Pack.

Use this feature to select how to pack remaining items in a packing list. *Remaining items* are quantities of an item code left over after packing an item code to the **Carton Capacity**. For example, if you are packing 8 units of an item code, and the **Carton Capacity** is 6, you will have one full carton with 6 units and 2 remaining units to pack.

**Note:** There can be more than one "last carton" in a packing list. Each item code can have a last carton—for example, a partially packed carton of remaining quantities of the item.

**Last Carton Handling** can impact carton number sequence. For more information, see "Carton Sequence in Vendor Portal" on page 62.

Vendor Portal packs Orders according to the selected **Last Carton Handling** options below:

- Single item one by one—Pack one item code per carton, and pack all remaining quantities of an item code in partially packed cartons before starting to pack the next item code. Carton numbers for cartons containing the same item code will be in sequence, as in the example below.

  For example, a packing list has 6 units of Item A and 7 units of Item B. The **Carton Capacity** is 5 units. Vendor Portal will pack as follows when you select the "Single item one by one" method:

  - Carton 1—5 units of A
  - Carton 2—1 unit of A
  - Carton 3—5 units of B
  - Carton 4—2 units of B

- All single items at the end—Pack one item code per carton, and do not pack remaining quantities of an item code in partially packed cartons until after packing all item codes into fully packed cartons. Fully packed cartons will be in sequence. Partially packed cartons for a single item code will not be in sequence after fully packed cartons for that item code.

  For example, a packing list has 6 units of Item A and 7 units of Item B. The **Carton Capacity** is 5 units. Vendor Portal will pack as follows when you select the "All single items at the end" method:

  - Carton 1—5 units of A
  - Carton 2—5 units of B

    - Carton 3—1 unit of A
    - Carton 4—2 units of B
- Single Style and Color with Mixed Size—Pack one item code per carton to fill cartons to the **Carton Capacity**, then pack in single cartons (full, then partial) remaining item codes that share the same style and color, but may have mixed sizes.
- Single Style with Mixed Color and Size—Pack one item code per carton to fill cartons to the **Carton Capacity**, then pack in single cartons (full, then partial) remaining item codes that share the same style, but may have mixed colors and/or sizes.
- Mixed Items—Pack one item code per carton to fill cartons to the **Carton Capacity**, then pack in single cartons (full, then partial) any mix of remaining items of all styles, colors, and sizes.

## Configuring Carton Dimensions and Weight

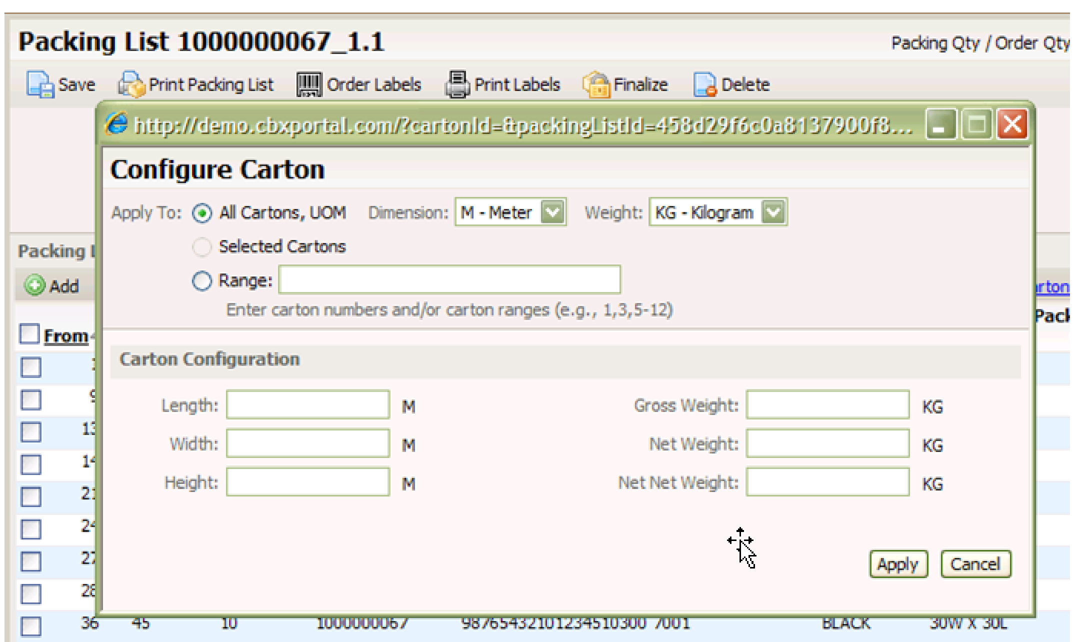
Use this procedure to configure carton dimensions and weight in a packing list.

### To configure carton dimensions and weight

**Note:** OpenText Vendor Portal carries forward carton configuration data to the ASN when you create the ASN. For information about associating saved carton settings with buyers, see “Working with Saved Carton Settings” on page 65.

1 On the **Packing List** page for the selected packing list, click **Configure Carton**.

The **Configure Carton** dialog box opens.




2 Do one of the following in the **Apply To** area at the upper left:

- To apply the dimensions and weight configuration to all cartons in the packing list, select **All Cartons**.

- To apply the configuration only to selected cartons in the packing list, close the dialog box, select the check boxes of the cartons you wish to use the same carton configuration, click **Configure Carton** to reopen the dialog box, then select **Selected Cartons**.
- To apply the configuration to a specific range of cartons, click **Range**, then in the adjacent field type the cartons numbers as described below the field.

3 Choose a unit of measure in the **Dimension** and **Weight** lists at the top of the dialog box.

4 In the bottom of the dialog box, type the dimensions and weight amounts for the carton(s) referenced in the **Apply To** section of the dialog box, then click **Apply**.

The dialog box closes and the **Packing List** page updates with the dimension and weight configurations for the cartons.

## Assigning Cartons to Containers

Use this procedure to assign cartons to containers in a packing list in Draft status.

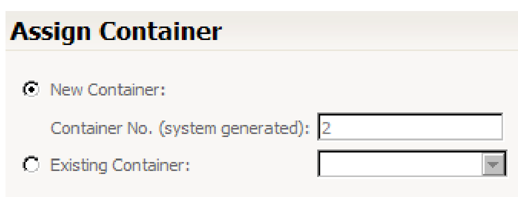
### To create or renumber containers

1 Open a packing list as described in "Viewing Packing Lists" on page 39.

2 Select the check box in the row of each carton to want to assign to a container. (Click the check box in the header row to select all cartons.)

3 Above the list of cartons, click **Assign Container**.

The **Assign Container** dialog box opens.




4 Do one of the following:

- To assign the cartons to a new container, leave **New Container** selected, and click **Apply** at the bottom of the dialog box. (You can change the system-generated Container No.)
- To assign the cartons to an existing container, select **Existing Container**, then select the container number from the list, then click **Apply**.

The dialog box closes.

# Working with Saved Carton Settings

OpenText Vendor Portal enables you to save preconfigured carton settings that you can apply to specific buyers or as the default setting for all buyers not associated with a carton setting. OpenText Vendor Portal applies the settings automatically so you don't have to enter them manually. (You can change a setting for a carton, if needed.)

A saved carton setting is called a *carton profile*.

This section is organized as follows:


- "Viewing Carton Settings" on page 66
- "Adding Carton Settings" on page 66
- "Editing Carton Settings" on page 67
- "Deleting Carton Settings" on page 67

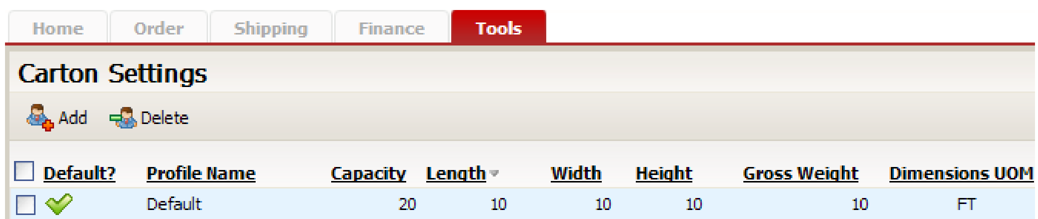

## Viewing Carton Settings

Use this procedure to view saved carton settings.

### To view carton settings

1. Click **Tools**, then in the **Navigation** panel at top left, click **Carton Settings**.

   The **Carton Settings** list page opens.




2. To view more details about saved carton settings than displays in the table, click the row of the saved carton setting to display details in a new page.

## Adding Carton Settings

Use this procedure to add and save carton settings. You must specify the capacity, length, width, height, and gross weight. You can also specify trading partners for a carton setting.

### To add carton settings

1. Click **Tools**, then in the **Navigation** panel at top left, click **Carton Settings**.

   The **Carton Settings** list page opens.

2. Click **Add**.

   A new page opens.

3 Specify the carton settings.

For **Name**, you might want to type **Default Profile** if this profile will apply to all or most buyers. If the profile will be for a specific company, you might want to use the company name—for example, Acme Profile.

Choose **Dimension** and **Weight** units of measure from those lists.

4 Do one of the following:

- To use these carton settings only for specific buyers, in the **Apply to Buyers** section at the bottom of the page, click the check boxes for those buyers.
- To apply these carton settings to all buyers except those assigned a different carton profile, click the check box **Set as Default**. A green check mark will display in the **Default?** column on the **Carton Settings** list page.

5 Click **Save**.

The settings will automatically be applied to cartons in packing lists for the specified buyers. You can edit cartons as needed.

## Editing Carton Settings

Use this procedure to edit saved carton settings.

**To edit carton settings**

1. Click **Tools**, then in the **Navigation** panel at top left, click **Carton Settings**.

   The **Carton Settings** list page opens.

2. Click the row of the profile you want to edit.
3. When the profile opens, make your changes, then click **Save**.

## Deleting Carton Settings

Use this procedure to delete saved carton settings.

**To delete carton settings**

1. Click **Tools**, then in the **Navigation** panel at top left, click **Carton Settings**.

   The **Carton Settings** list page opens.

2. Click the check box in the row of any profile you want to delete.
3. Click **Delete**.

   The profile will not apply carton settings in packing lists.

# Updating and Amending Packing Lists

You can *update* a packing list if it is not fully packed or not in Final status. This enables you to add, edit, or delete cartons. If it is fully packed, you can delete cartons, then update the packing list.

If the packing list is in Final status, you can *amend* it. This means you can edit or delete cartons, and add cartons in some circumstances.

The section is organized as follows:

## Packing List Updates and Alerts to Update Packing Lists

When a trading partner updates a PO, OpenText Vendor Portal automatically updates any packing lists for that PO. Vendor Portal displays an exclamation (!) icon to alert you in the user interface about these changes. This prevents you from working in versions of packing lists that become outdated.

For example, when a packing list has a quantity of 100 of item A packed:

- If an updated PO increases the quantity of item A, Vendor Portal displays a blue exclamation (!) icon in the row of the affected PO and packing list to alert you to add cartons to pack the additional items.
- If an updated PO decreases the quantity of item A, Vendor Portal displays a red exclamation (!) icon in the row of the affected PO and packing list to alert you to edit or delete cartons to match the quantity in the revised PO.
- If an updated PO indicates that the retailer wants a different item instead of item A, Vendor Portal displays a red exclamation (!) icon in the row of the affected PO and packing list to alert you that Vendor Portal removed item A from the cartons. You should update the packing to match the revised PO.

In all cases above, Vendor Portal removes the exclamation (!) icon after the recommended user action occurs. See “To accept or deny an automatic update of a packing list” on page 68

When OpenText Vendor Portal receives an updated PO, it uses the rules described in the example above to do one of the following:

- If the packing list is in Draft status, Vendor Portal automatically refreshes it with the latest PO information. It leaves the packing list version number and status unchanged and displays a blue or red exclamation icon based on the scenarios in the example.
- If the packing list is in Final status, Vendor Portal automatically updates it. It increments the packing list version number and saves the packing list in Draft status, enabling further changes and displays a blue or red exclamation icon based on the scenarios in the example.

### To accept or deny an automatic update of a packing list

1 Open the packing list marked with an exclamation (!) icon.

A message announces that the packing list does match the new PO and defines the exclamation (!) icon. The message recommends reviewing the changes to PO and taking action.

**Note:** If you open the new PO, a PO Difference Report is available.

2. To display only the cartons affected by the PO update, select the **Show Marked Only** check box at the upper right. Only cartons marked by exclamation (!) icons will display.
3. To accept the OpenText Vendor Portal automatic update of the packing list, click **Amend**.

   To not accept the OpenText Vendor Portal automatic update of the packing list, click **Clear Marks**.

## Updating Packing Lists

To change the packing of an existing packing list, use the following procedure, which cross-references the procedures used to create packing lists: Auto Pack, Partial Pack, Ratio Pack, and Split Pack.

To work with cartons in the shipment, see the cross-references listed in "Updating and Amending Packing Lists" on page 67

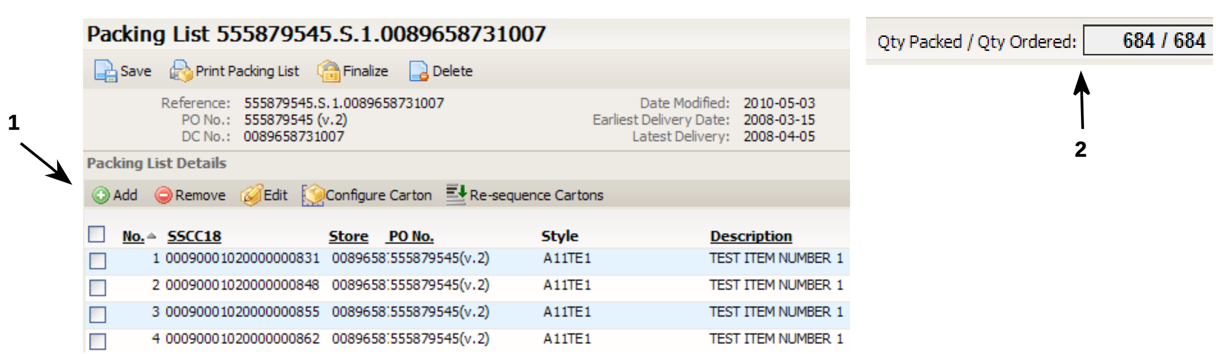
**Note:** The packing list must be in Draft status to update it. If the packing list is in Final status, first amend the packing list, which changes the status to Draft, then update the packing list as described below. See "Amending Packing Lists in Final Status" on page 73.

### To update a packing list

1. Click the **Shipping** tab.

   The **Shipping** tab **Customer Orders** page opens.
2. Click the **Packing Lists** option in the **Navigation** panel.

   The **Packing Lists** page displays.
3. Click a packing list row to open that packing list.

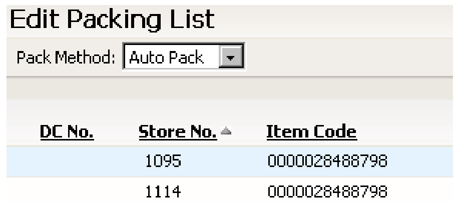



| | |
|---|---|
| **1** | Click **Add** to change packing. |
| **2** | The **Qty Packed / Qty Ordered** box at the upper right of the page provides a running count of your pack quantity to the quantity ordered for DC. |

**Note:** In the upper right corner, the **Qty Packed / Qty Ordered** box provides a running tally of your pack quantity in the packing list compared to the quantity ordered for the DC.

4 To change packing, such as to add cartons to the shipment, click **Add**.

The **Edit Packing List** dialog box opens in a separate window. It lists the Store Number, Item Code, color, size, and pack quantities for each item in the Order.




5 Edit the packing list using the procedures used to create packing lists:

- "To use Auto Pack for Pick and Pack or Standard Pack ASNs" on page 46
- "To pack using Partial Pack" on page 51
- "To pack using Ratio Pack" on page 55
- "Packing with Split Pack" on page 58

**Note:** The above procedures refer to the **Create Packing List** dialog box. When you edit a packing list, the dialog box is named **Edit Packing List**.

6 Click **Update Packing List** at the bottom of the **Edit Pack List** page.

**Note:** In the packing procedures above, the button is named **Create Packing List**.

The **Packing List** page updates with your changes.

## Editing Cartons in a Packing List

Use the following procedure to edit cartons in a packing list if the packing list is not in Final status.

If the packing list is in Final status, you can amend the packing list. See also "To amend a packing list" on page 73.

### To edit cartons in a packing list

1 Click the **Shipping** tab.

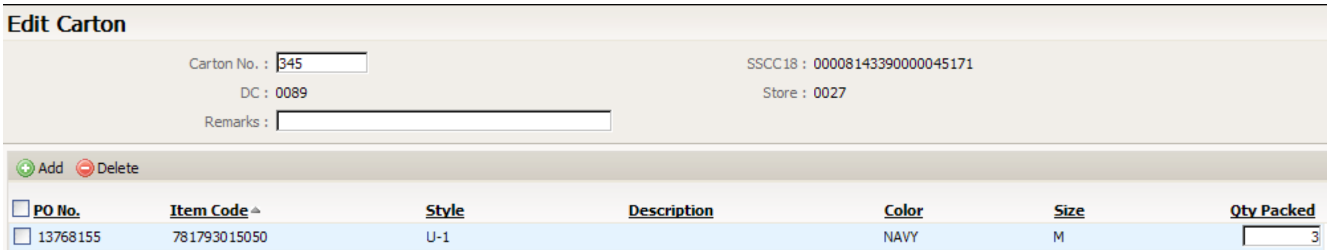
The **Shipping** tab **Customer Orders** page opens.

2 Click the **Packing Lists** option in the **Navigation** panel.

The **Packing Lists** page displays.

3 Click a packing list row to open that packing list for viewing.

4 In the individual carton view mode, click the check box in the row of a carton you wish to edit, then click **Edit**.




A dialog box opens in which you can do the following:

- Change the **Carton Number** for this carton. This is the row number that determines where the carton displays in a list in Vendor Portal, It is not the SSCC-18 carton number, which you cannot edit.

  **Note:** To re-number all cartons in the packing list by starting with a row number other than 1, see "Re-numbering a List of Cartons" on page 74.

- Type **Remarks** for the carton. For example, if some items have been back ordered, you can add a note in **Remarks**.
- To add an item to the carton:
  1 Click **Add** in the dialog box to add a new row in the dialog box.
  2 Use the lists in the row to select a **PO** and an **Item Number** to add.
  3 In the **Packing Qty** at the far right type the number of units to add.
- Remove an item from the carton by clicking the item's check box, then clicking **Delete**.
- Change a quantity packed of an item or inner pack (**Qty Packed**).

  Note the following:

  - If you decrease the **Qty Packed**, Vendor Portal automatically saves the decrease as back ordered. The data will available for future packing of the Order.
  - If the carton contains back-ordered items, the **Qty Packed** value is the quantity of the item not included in previous packing lists for the customer Order.

5 Make changes as described in the previous step.

6 Click **Apply** at the bottom right.

The dialog box closes and the **Packing List** page updates with your changes.

7 To save the edited packing list, click **Save** on the **Packing List** page.

To finalize the edited packing list, which is required to create an ASN, click **Finalize**.

## Adding Cartons to a Packing List

Use the following procedure to add cartons to a packing list if the customer Order is not fully packed.

### To add cartons to a packing list

1 Click the **Shipping** tab.

The **Shipping** tab **Customer Orders** page opens.

2 Click the **Packing Lists** option in the **Navigation** panel.

The **Packing Lists** page displays.

3 Click a packing list row to open that packing list for viewing.

4 Click **Add.**

The **Edit Packing List** dialog box opens with proposed new cartons based on the default settings.

For details about the dialog box, see the procedures for Auto Pack, Partial Pack, and Ratio in "Creating Packing Lists " on page 43.

5 If necessary, select a different **Pack Method** or other settings, such as the **Last Carton Handling** list to select how to pack the new cartons.

**Note:** For Partial Pack and Ratio Pack, you must use the check boxes to select the cartons to add—either all cartons (check box in header row), or individual cartons.

6 Click **Add Cartons** at the bottom right of the dialog box to add the cartons.

The dialog box updates the **Balance Qty** for each new carton, and the **Packing Qty** in the upper right corner of the dialog box.

7 Click **Cancel** to close the dialog box.

The **Packing List** page has updated to display the new cartons and a new **Packing Qty** total at the upper right for the packing list.

## Deleting Cartons from a Packing List

Use the following procedure to delete cartons from a packing list.

### To delete cartons from a packing list

1 Click the **Shipping** tab.

The **Shipping** tab **Customer Orders** page opens.

2 Click the **Packing Lists** option in the **Navigation** panel.

The **Packing Lists** page displays.

3 Click a packing list row to open that packing list for viewing.

4 Click the check box in the row of a carton you wish to delete, then click **Delete**.

**Note:** You can select multiple cartons to delete in one action.

The carton is removed from the packing list, and the **Packing Qty** amount decreases accordingly in the upper right corner.

## Moving Cartons to Other Packing Lists

Use this procedure to move cartons from one packing list to another packing list. The packing list containing the cartons that you move must be in Draft status.

### To move cartons to another packing list

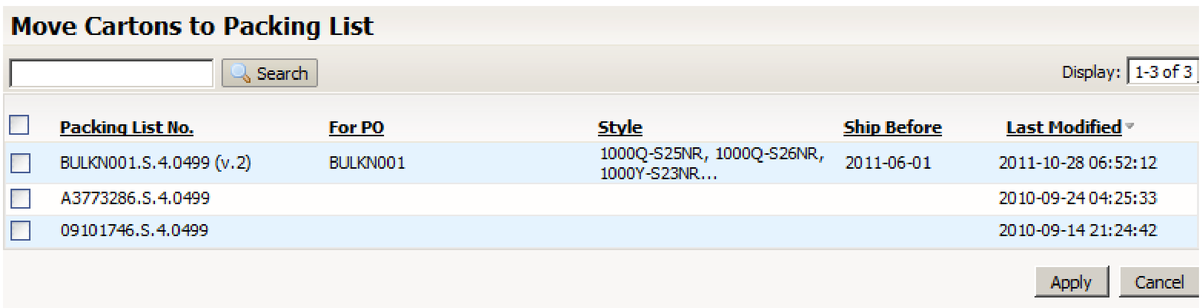
1 Open the packing list that contains the cartons, as described in "Viewing Packing Lists" on page 39.

2 Select the check box for each carton you want to move another packing list.

3 Click **Move to Another PL**.

**Note:** If a selected carton is a split carton (that is, the item is packed in more than one carton, such as an item shipped as multiple components), Vendor Portal asks if you want to also move other cartons that contain the item. To do so, click **OK** in the message box. Not all trading communities allow split cartons.

The **Move Cartons to Packing List** dialog box opens.




A list of packing list probably displays. To move cartons to a different packing list, type the packing list number into the **Search** field, then click **Search**.

4 Select the check box(es) for the packing list(s) to move the cartons to, then click **Apply**.

The dialog box closes. On the **Packing List** details page, the cartons no longer display. They are now in a different packing list.

## Amending Packing Lists in Final Status

Use the following procedure to amend a packing list that is in Final status.

To update a packing list in Draft status, see "Updating Packing Lists" on page 69.

When you amend the packing list, OpenText Vendor Portal automatically updates all carton item details based on the latest version of the PO.

### To amend a packing list

1 Click the **Shipping** tab.

The **Shipping** tab **Customer Orders** page opens.

2 Click the **Packing Lists** option in the **Navigation** panel.

The **Packing Lists** page displays.

3 Click a packing list row to open that finalized packing list.

4 Click **Amend**.

The packing list becomes editable.

5 Click the check box in the row of a carton you wish to edit, then click **Edit**.

The carton dialog box opens for editing. See the following:

- "To edit cartons in a packing list" on page 70
- "To delete cartons from a packing list" on page 72

6 Make changes as needed, then click **Apply** in the dialog box.

The **Packing List** page updates with your changes.

7 Repeat the above for other cartons, if necessary.

8 To save the amended packing list, click **Save**.

To finalize the amended packing list, which is required to create an ASN, click **Finalize**.

## Re-numbering a List of Cartons

Use the following procedure to re-number a list of cartons to begin with a row number other than 1. This is useful to apply serial numbering to all cartons in an ASN when the ASN includes more than one packing list.

This procedure does not change SSCC-18 numbers. It changes carton row numbers in Vendor Portal.

To change a specific carton row number instead re-numbering the full list, see “Editing Cartons in a Packing List” on page 70.

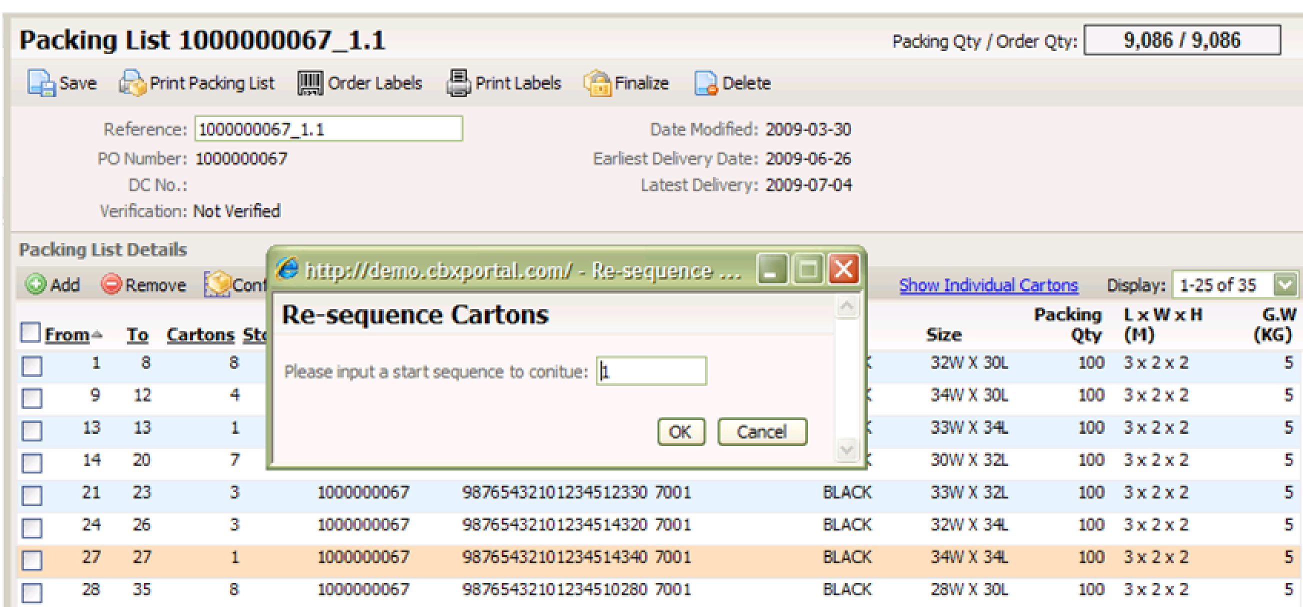
### To re-number a list of cartons

1 Open the packing list as described in “Viewing Packing Lists” on page 39.

2 Click **Amend**.

The page resets.

3 In either the individual carton or carton group view, click **Re-sequence Cartons**. A dialog box opens.




4 In the dialog box field, type the number you wish the carton row numbering for this packing list to begin with—for example, 20.

5 Click **OK**.

The dialog box closes and the carton row numbering on the **Packing List** page renumbers.

# Deleting Packing Lists

Use the following procedure to delete a packing list.

You cannot delete a packing list in Final status. To delete a packing list in Final status, amend the packing list, which changes the status to Draft, then delete it.

### To delete a packing list

1. Click the **Shipping** tab.

   The **Shipping** tab **Customer Orders** page opens.

2. Click the **Packing Lists** option in the **Navigation** panel.

   The **Packing Lists** page displays.

3. Click a packing list row to open the packing list.
4. Click **Delete**.

   The packing list is deleted.

# Printing and Downloading Packing Lists

Use the following procedure to print or download a packing list.

To print shipping labels, see “To print shipping labels” on page 76.

### To print or download a packing list PDF file

**Note:** You can also print a **Carton Report** from the ASN after you create an ASN. See “Printing ASNs, BOLs, and Carton Reports” on page 93.

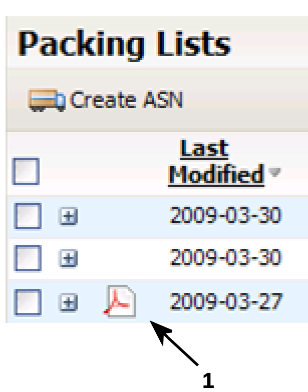
1. Click the **Shipping** tab.

   The **Shipping** tab **Customer Orders** page opens.

2. Click the **Packing Lists** option in the **Navigation** panel.

   The **Packing Lists** page displays.

   **Note:** A PDF icon in the row of a packing list indicates that a PDF file of the packing list has already been printed or downloaded.




1 Adobe PDF icon indicates a PDF print file has been printed or downloaded.

3. Click a packing list row to open that packing list.
4. Click **Print Packing List.**

The **File Download** dialog box displays.

**5** To print the packing list, in the dialog box click **Open** to open the PDF in Adobe Reader, then in Adobe Reader click **Print**.

To save the packing list as a PDF file, in the dialog box click **Save**, then in the **Save As** dialog box save the file in the usual manner.

# Printing Shipping Labels

Use the following procedure to print shipping labels for a packing list.

### To print shipping labels

After you create a packing list, you can use OpenText Vendor Portal to print shipping labels for your cartons.

**Important:** To print shipping labels, you must have a printer and label paper stock that can print the labels. This may be impacted by your trading partner's label requirements.

**1** Click the **Shipping** tab.

The **Shipping** tab **Customer Orders** page opens.

**2** Click the **Packing Lists** option in the **Navigation** panel.

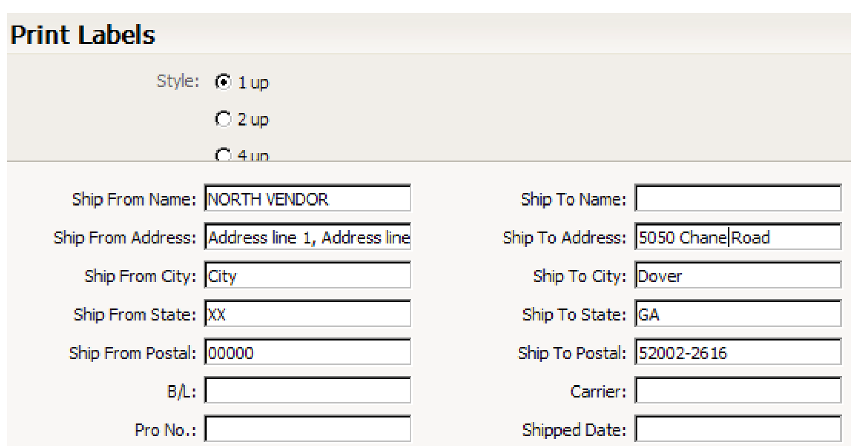
The **Packing Lists** page displays.

**3** Find the packing list that contains the cartons you wish to print labels for.

To find the packing list, see "To view packing lists" on page 39.

**Note:** You can print labels for packing lists in either Draft or Final status.

**4** Open a packing list, then click **Print Labels**.




The **Print Labels** page opens. Much as the shipping information is prepopulated.

**5** Enter or edit information as needed:

- Style—Select 1, 2, or 4 labels per page

- Ship From information—This can include a Bill of Lading (B/L) number and Pro. No. as well as the Ship From name and address.

  **Note:** To create a default Ship From address that populates automatically, see "Creating Default Ship From Values" on page 90.

- Ship To information—This can include the Carrier identifier and shipping date as well as the Ship to name and address.

**Note:** OpenText Vendor Portal stores any changes you make and will apply those changes in the future to save you time.

6 Click **OK**.

The **File Download** dialog box opens.

7 To print labels later, click **Save** to save the PDF file of the labels.

8 To print labels now, or to view the PDF file, click **Open**. The file opens in Adobe Reader.

9 In Adobe Reader click **Print**.

The **Print** dialog box opens.

10 In the **Print** dialog box, click **OK**.

The labels print to the assigned printer.

# ASNs

# 4

This chapter describes how to work with ASN documents in OpenText Vendor Portal. After finalizing a packing list, you can create an Advance Ship Notices from one or more packing lists.

This chapter is organized as follows:



## Viewing ASNs

Use the following procedures to view ASNs:



### Opening ASNs

You can access a list of ASNs from either the **Shipping** or **Finance** tabs. The lists are identical.

#### To open an ASN

1 Click the **Shipping** tab, then click the **Advance Ship Notices** option in the **Navigation** panel, or click the **Finance** tab.

The **Advance Ship Notices** list page displays a list of ASNs.

**Note:** By default, OpenText Vendor Portal displays a maximum of 25 rows in a list. To modify this, see "Changing the Maximum Number of Rows that Display" on page 112.

The page includes the following columns:

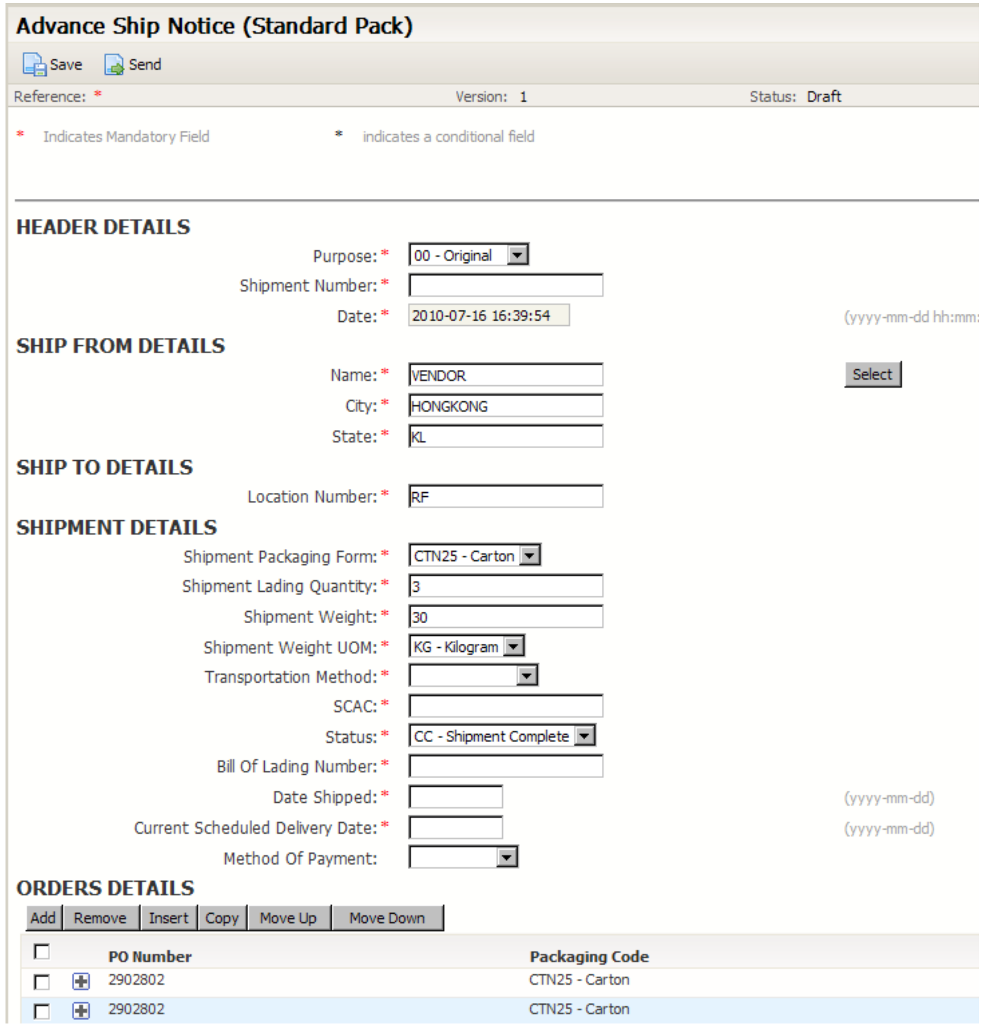
- For—Trading partner
- Ship Notice No.
- Ship Date

- Version—Version number of the document.
- Status—Current status of each ASN, either Draft (not sent) or Final (sent).
- Last Modified—Date and time the document was last edited, saved, or sent. A document can be sent only once, so the last possible date modified for a document is when it is sent.
- Ack—Indicates if your trading partner has sent a Functional Acknowledgment (997) in response to the ASN. The column indicators are as follows:
  - <Blank>—No response.
  - A—Accepted
  - R—Rejected
  - E—Accepted with errors

**Note:** The indicator also displays if you open an outbound document—for example, in an **Acknowledge Status** field.

2 Click an ASN row to open that ASN for viewing and editing.

The ASN displays.

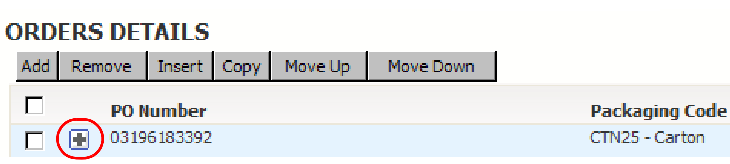



## Viewing High-level Order and Packing Details in ASNs

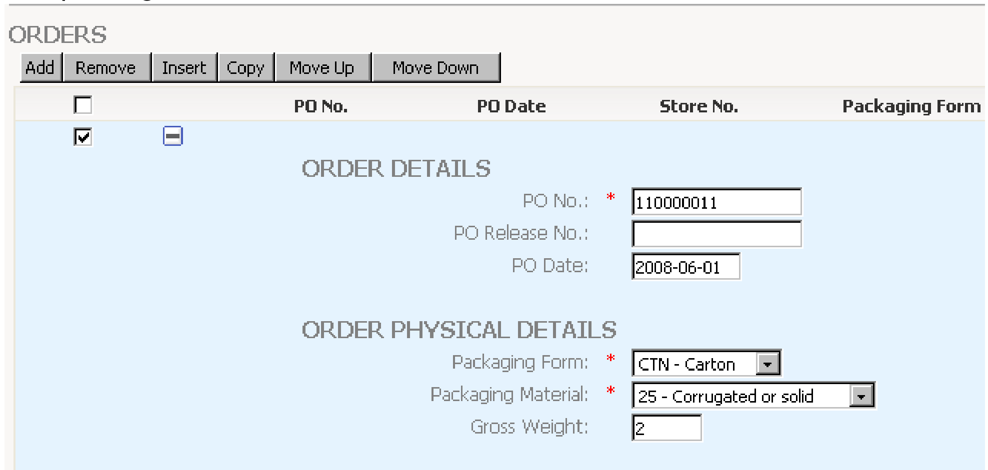
### To view high-level Order and packaging details in an ASN

1 Open the ASN as described in "To open an ASN" on page 79.

2 Click **+/-** in the Order row in the **Order Details** section.



The row expands to display Order and packaging data from the customer Order and packing list.



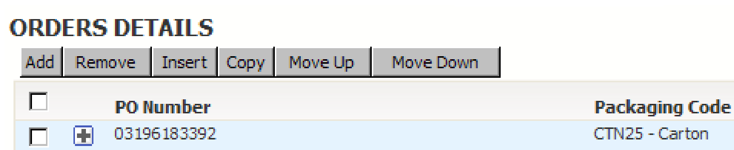

To collapse the row (that is, hide the details), click **+/-** again.

## Viewing Order Details in ASNs

### To drill down to view Order details

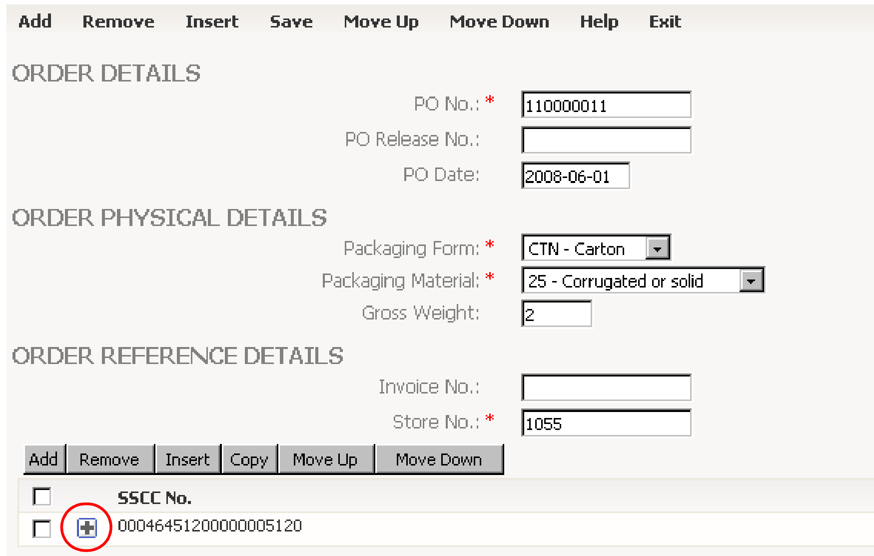
**Note:** This procedure uses the hierarchy for a Pick and Pack packing structure as an example. The sequence of steps would vary with a different packing structure. For more information, see "About ASN Formats in OpenText Vendor Portal" on page 89.

1. Open the ASN as described in "To open an ASN" on page 79.
2. Click the Order row (not the **+** icon) in the **Order Details** section at the bottom of the page.

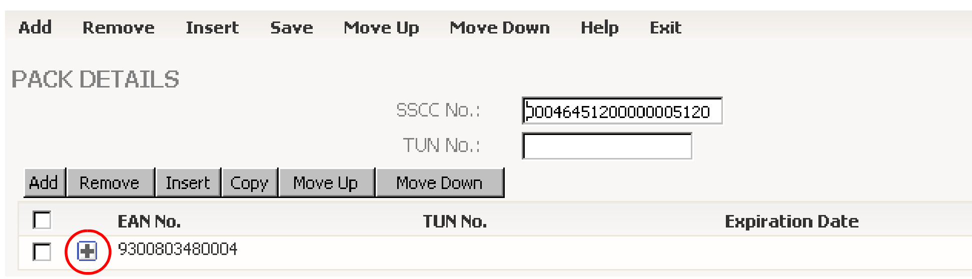


A new page displays Order and packaging details, including SSCC-18 carton numbers in a table at the bottom.

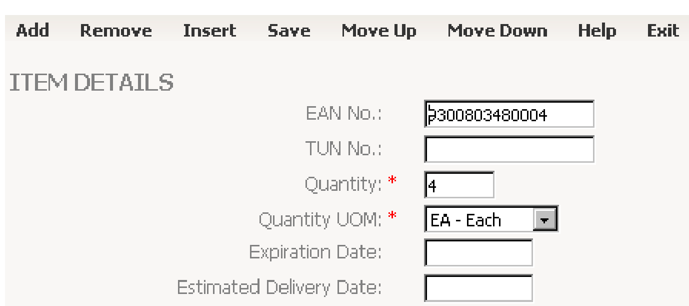
**Note:** To edit an ASN, see "Working with Details in an ASN" on page 87.




3 To view or edit pack details for a carton, click **+** for a carton on the **Order Details** page. Pack Details displays, as below.



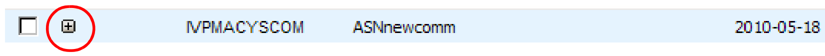

4 To view details for an item in a pack, click **+** for the item under **Pack Details**. **Item Details** displays, as below.



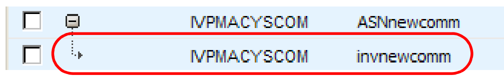
## Viewing Invoices Associated with ASNs

**To view an Invoice associated with an ASN**

1. On the page listing ASNs, click the **+** icon at the end of an ASN row to show links to documents associated with the ASN, such as Invoices.




An arrow points from the ASN to a new row below the ASN.




Click the **-** icon to hide the document links.

2. Click the new row to open the Invoice.

For more information, see "Viewing Invoices" on page 95

# Creating ASNs

Use the procedure below to create ASNs, including Consolidated ASNs.

When you create an ASN, OpenText Vendor Portal transfers item details from the packing list(s) associated with the ASN. You do not have to re-enter Order and packing data, but you do have to enter some shipment-related information—for example, a Bill of Lading number.

The section is organized as follows:

- "Creating the ASN" on page 84
- "About ASN Formats in OpenText Vendor Portal" on page 89
- "Creating Default Ship From Values" on page 90

## Creating the ASN

Use the following procedures to create an ASN:

**To create an ASN**

**Note:** This procedure applies to creating an ASN from one or more packing lists.

1. Click the **Shipping** tab.

   The **Shipping** tab **Customer Orders** page opens.

2. Click the **Packing Lists** option in the **Navigation** panel.

   The **Packing Lists** page displays a list of all packing lists and their current status, such as Draft (that is, in progress) or Final. To create an ASN, the packing list must be in Final status.

3. Do one of the following, depending on which options are available in your trading community:

   - To create an ASN from a single packing list, click **Create ASN** in the row of the packing list.

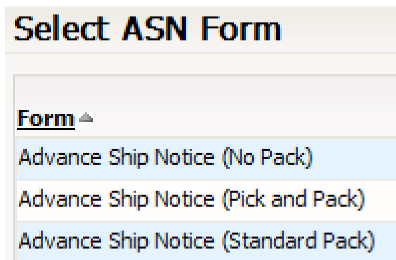
     **Note:** You also can click **Create ASN** in an open packing list.

- To create an ASN from multiple packing lists, select the check box for each packing list to include in the ASN, then click **Create Consolidated ASN** above the list.

  OpenText Vendor Portal will verify that the Ship To locations from all of the Purchase Orders are the same, and that the retailer for each packing list is the same.

  Vendor Portal checks whether or not a Consolidated ASN already exists for the packing lists. If one does exist and you choose to continue, Vendor Portal will amend the ASN instead of creating a new ASN.

If your retailer supports more than one ASN format, the **Select ASN Form** dialog box opens. Options vary among retailers.



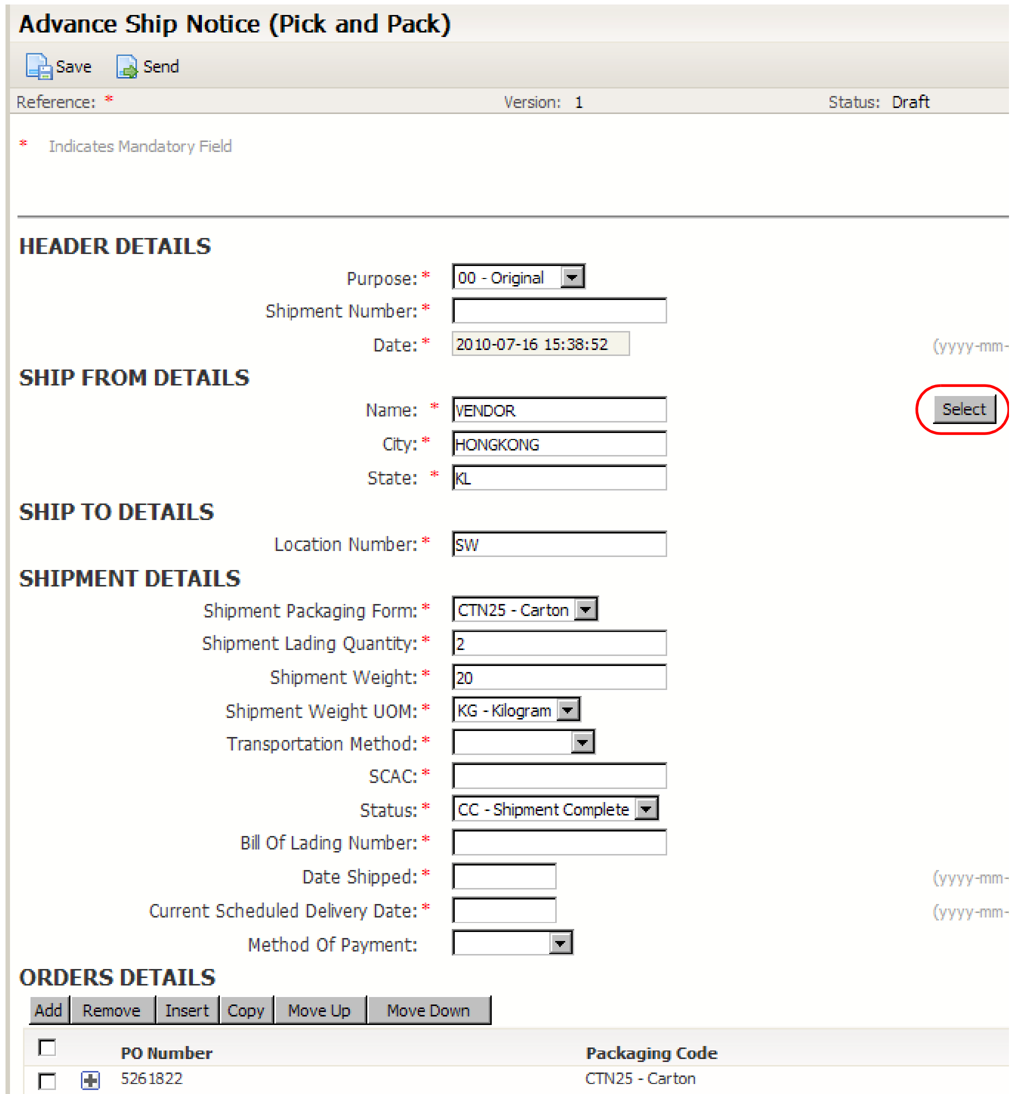

**Note:** For ASN form descriptions, see "About ASN Formats in OpenText Vendor Portal" on page 89.

If your retailer does not support a choice of ASN forms, the preferred ASN form opens automatically. Skip the next step.

4 If Vendor Portal displays a choice of ASN forms to use to create the ASN, click the form name.

The ASN form opens for the selected ASN type. The form includes data transferred from the Order and the packing list, and fields are at the Shipment level of the ASN. The lower levels of the ASN are described in "Working with Details in an ASN" on page 87.

The screenshot below uses the Pick and Pack ASN format as an example.




**5** Add required and other information in the available fields.

**Note:** To add a saved Ship From address to the ASN and shipping label, at right in the **Ship From Details** section, click **Select**. When the list of Ship From records opens, click the one you want to use to insert that Ship From information into the ASN. For more information, see “Creating Default Ship From Values” on page 90.

For more information, see the following:

- “Asterisks Indicating Required Fields in Document Forms” on page 15.
- “Working with Details in an ASN” on page 87.

## Working with Details in an ASN

Use the following procedures to work with the **Order Details**, **Pack Details** (for Pick and Pack and Standard Pack ASNs), and **Item Details** pages in an ASN.

**Note:** The procedures below describe **Order Details**. To work with cartons in **Pack Details** or items in **Item Details**, drill down to the pack or item level as described in "Viewing High-level Order and Packing Details in ASNs" on page 81, then use the same procedure as for an Order, but use it at the pack or item level instead of at the Order level.

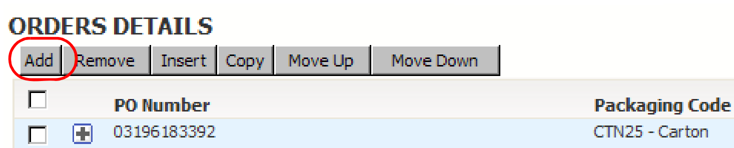
The procedures are as follows:

- "To add an Order to an ASN" on page 87
- "To remove an Order from an ASN" on page 87
- "To insert an Order above an existing Order in the ASN" on page 88
- "To copy an existing Order to a new row in an ASN" on page 88
- "To move an Order up or down in an ASN" on page 89
- "To save, send, or print an open ASN" on page 89

### To add an Order to an ASN

1 Open the ASN as described in "Viewing ASNs" on page 79, or continue working in an ASN that you began creating in "Creating ASNs" on page 84.

2 Click **Add**.



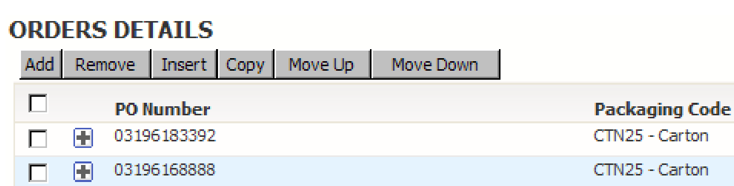

A new Order row displays in expanded form after existing Orders.

**Note:** To add an Order above an existing Order, see "To insert an Order above an existing Order in the ASN" on page 88.

3 Enter the required and other information for the Order, such as PO Number.

4 After you collapse the new PO by clicking the **-** icon, or save the ASN and then reopen it, the new PO displays below any existing POs.

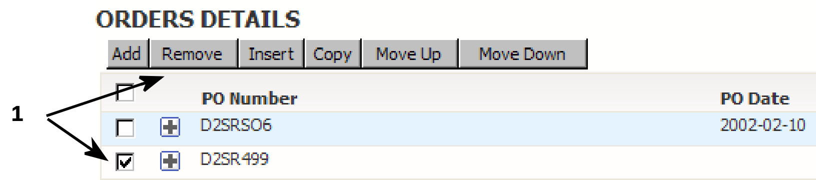
The page refreshes and displays the added PO.




### To remove an Order from an ASN

1 Open the ASN as described in "Viewing ASNs" on page 79, or continue working in an ASN that you began creating in "Creating ASNs" on page 84.

2 Click the check box for an Order to place a check mark in it, then click **Remove**.




**1** Select the check box of the Order to remove, then click **Remove**.

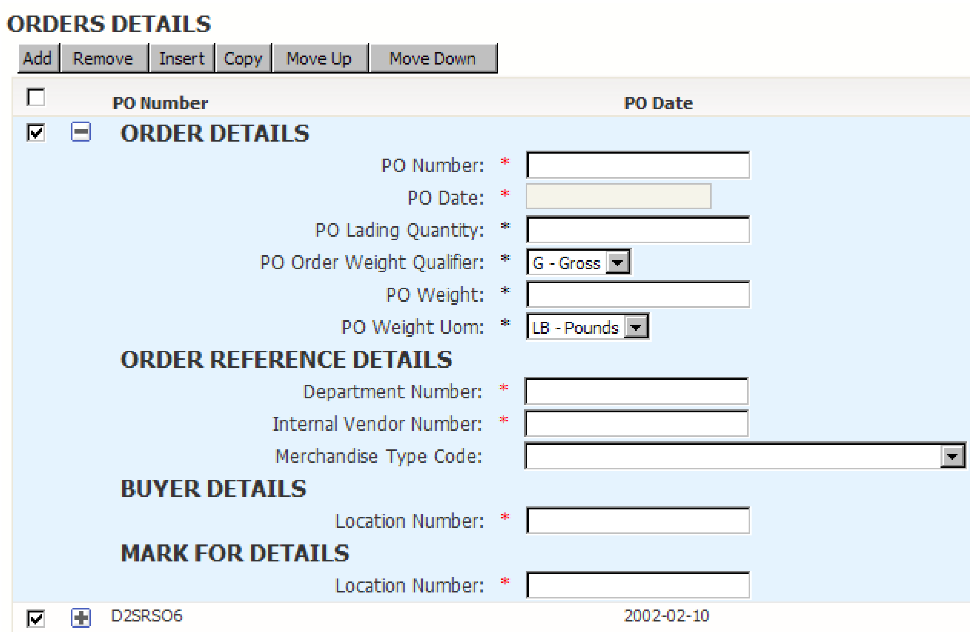
The Order row is removed from the ASN.

### To insert an Order above an existing Order in the ASN

1 Open the ASN as described in “Viewing ASNs” on page 79, or continue working in an ASN that you began creating in “Creating ASNs” on page 84.

2 Click the check box for an existing Order to place a check mark in it, then click **Insert**.

A new Order row displays in expanded form above the selected Order, which remains not expanded.




3 Enter the required data, such as PO Number, for the Order you are inserting.

### To copy an existing Order to a new row in an ASN

If you want to change an ASN, to save time you can copy an existing PO in the ASN, then modify it as needed. For example, you might want to do this after receiving a PO Change or a second PO, or to add a PO similar to an existing PO already in the ASN.

1 Open the ASN as described in “Viewing ASNs” on page 79, or continue working in an ASN that you began creating in “Creating ASNs” on page 84.

2 Click the check box for an existing Order to place a check mark in it, then click **Copy**.

A new Order row displays in expanded form below the selected Order.

3 Work with the Order as needed.

### To move an Order up or down in an ASN

1 Open the ASN as described in "Viewing ASNs" on page 79, or continue working in an ASN that you began creating in "Creating ASNs" on page 84.

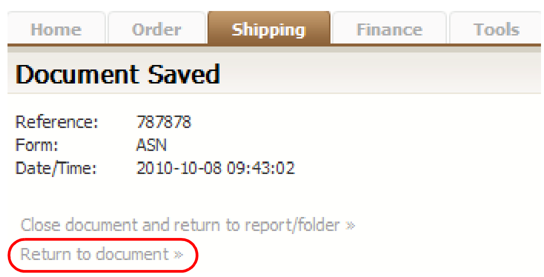
2 To move an Order up or down in the **Orders** section of the ASN, click the check box in the existing Order row to place a check mark in it, then click **Move Up** or **Move Down** as needed.

### To save, send, or print an open ASN

1 Click **Save** at any time to save your work in an ASN.

The **Document Saved** page displays.

2 To reopen the ASN, click the **Return to document** link.




To return to the **Advance Ship Notices** list page, click **Close document and return to report/folder.**

3 To send an ASN that you have open in Vendor Portal, click **Send**, then click **Yes** in the message box that asks if you want to save the document.

The **Document Sent** page displays. On the ASN list page, the ASN status displays as Final.

4 To print an ASN you have open in Vendor Portal, click **Print ASN**.

## About ASN Formats in OpenText Vendor Portal

When you create ASN for some retailers, OpenText Vendor Portal enables you to choose the format of the ASN:

- "Pick and Pack" on page 89
- "Standard Pack" on page 90
- "No Pack" on page 90

### Pick and Pack

Pick and Pack is often used to pack items with different quantities, or to pack different types of items in the same package. You define the package first, then the item.

For basic Pick and Pack the descending hierarchy structure is as follows:

- Shipment

- Order
- Package
- Item

### Standard Pack

Standard Pack is often used with standard quantities—for example, when you sell 12 items in a standard package, and the retailer orders a certain number of packages of the item. Pack one type of item in a container.

You define the item first, then the package, which is the opposite of Pick and Pack.

For basic Standard Pack the descending hierarchy structure is as follows:

- Shipment
- Order
- Item
- Package

### No Pack

No Pack is often used to ship a small quantity of a large item, such as a piece of equipment. It does not include cartons or containers inside the shipment. It includes only the shipment container itself and the item(s) being shipped.

**Important:** In OpenText Vendor Portal you must create a temporary, virtual “carton” when you create a No Pack packing list. The “carton” will be eliminated when you create the No Pack ASN. For details about packing, see “To use Auto Pack for No Pack ASNs” on page 50.

For No Pack the descending hierarchy structure is as follows:

- Shipment
- Order
- Item

## Creating Default Ship From Values

Use the following procedure to create one or more default Ship From values that you can use to automatically populate Ship From fields in an ASN and associated shipping label. This saves the time and possible error that can occur if you must repeatedly type the same information.

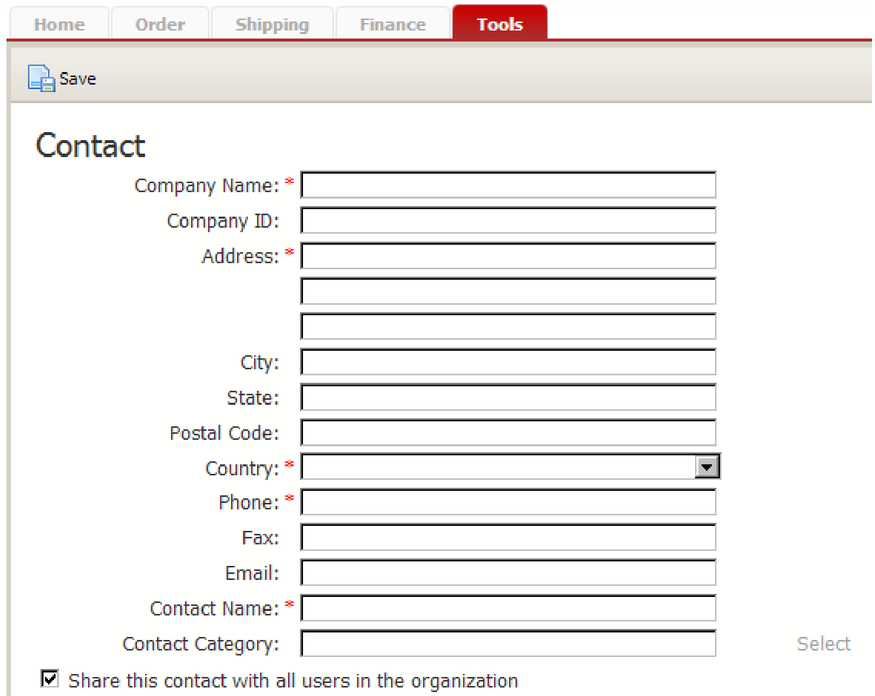
### To create a default Ship From value

1. Click the **Tools** tab, then click the **Contacts** navigation option.

   The **Contacts** page displays existing contacts or, if no contacts exist, a page opens to create a new contact.

   **Note:** In Vendor Portal, a “contact” can be a name for a set of data, such as Ship From information. A contact is not always a person.

2 If you already have one or more contacts, click **Add** to open the page to create a new Contact.




The **Contact** page opens.

3 Enter information as needed (red asterisks indicate required fields):

- Company Name—Meaningful name for the Ship From “contact,” such as Rochester Warehouse.
- Company ID—Vendor Communication ID—for example, 01 followed by your Duns Number.
- Address, City, State, Postal Code, Country—Physical location for the Ship From contact.
- Phone—Phone number of the person the retailer should contact if an issue occurs with the Ship From information in the ASN or label.
- Email—Email address of the person the retailer should contact if an issue occurs with the Ship From information in the ASN or label.
- Contact Name—Name of the person the retailer should contact if an issue occurs with the Ship From information in the ASN or label.
- Contact Category—Type **Ship From**.

4 (Optional) To enable other users to work with this default value, select the **Share this contact with all users in the organization** check box.

5 Click **Save**.

6 Repeat this procedure to add other Ship From default values.

When you create a new ASN, click **Select** in the Ship From Details sections to view a list of your default Ship From values. Select from the list to insert the information in the ASN. For more information, see “Creating the ASN” on page 84.

# Amending ASNs

Use this procedure to amend ASNs. When you amend an ASN, OpenText Vendor Portal automatically updates carton details based on the latest packing list(s).

**To amend an ASN**

1. Click the **Shipping** tab, then click the **Advance Ship Notices** option in the **Navigation** panel, or click the **Finance** tab.

   The **Advance Ship Notices** list page displays.

2. Click an ASN row to open that ASN for viewing.
3. Click **Amend**.

   The ASN page resets to become editable.

4. Edit the ASN as needed.

   The **Shipment** level displays on screen. For a description of the lower levels of the ASN, see “Working with Details in an ASN” on page 87.

   For example, add or remove Orders, or change packing or item details.

5. Do any of the following:
   - To save the amended ASN without sending it at this time, click **Save**.
   - To send the amended ASN to your trading partner, click **Send**. (The application also will save the ASN.)
   - To print the amended ASN, click **Print ASN.**

# Deleting ASNs

Use this procedure to delete ASNs. The ASN must be in Draft status to delete it.

**To delete an ASN**

1. Click the **Shipping** tab, then click the **Advance Ship Notices** option in the **Navigation** panel, or click the **Finance** tab.

   The **Advance Ship Notices** list page displays.

2. Select the check box for each ASN you want to delete.
3. Click **Delete**.

   **Note:** You can also click **Delete** with an ASN open.

   The ASN is removed from the ASN list.

# Printing ASNs, BOLs, and Carton Reports

Use this procedure to print ASNs, Bill of Lading shipment details, and Carton Reports.

### To print an ASN, BOL, or Carton Report

1. Click the **Shipping** tab, then click the **Advance Ship Notices** option in the **Navigation** panel, or click the **Finance** tab.

   The **Advance Ship Notices** list page displays.

2. Click an ASN row to open that ASN for viewing.
3. Do any of the following:
   - To print the ASN, click **Print ASN**.
   - To print a Bill of Lading report that includes shipment details, click **Print BOL**.
   - To print a Carton Report of shipment details, click **Print Carton Report**.

   The ASN prints to the assigned printer.

# Invoices

# 5

This chapter is organized as follows:



## Using the Finance Tab

Use the **Finance** tab to work with Invoices.

If implemented for your trading relationship, the **Finance** tab also displays Credit/Debit Adjustment (812) and Payment Order/Remittance Advice (820) documents, if any, at the top of the list, and a **Navigation** panel option for these document types appears in the top left panel.

In the **Finance** tab you can view customers Orders and ASNs by clicking those links in the **Navigation** panel at top left.

## Viewing Invoices

Use this procedure to view Invoices.

### To view Invoices

1. Click the **Finance** tab.
2. Click the **Invoices** option in the **Navigation** panel.

   The **Invoices** list page displays a list of Invoices.

   **Note:** By default, OpenText Vendor Portal displays a maximum of 25 rows in a list. To modify this, see "Changing the Maximum Number of Rows that Display" on page 112.

   The page includes the following columns:

   - For—Trading partner the Invoice is for
   - Invoice No.
   - PO No.—PO Number for the PO associated with the Invoice

- Invoice Date—Date the document was created.
- Version—Version number of the document.
- Status—Current status of each Invoice, either Draft (in progress, not sent) or Final (sent).
- Last Modified—Date and time the document was last edited, saved, or sent. You can send an Invoice only once, so the last possible date is the send date.
- Ack—Indicates if your trading partner has sent a Functional Acknowledgment (997) in response to the Invoice. The Ack indicators are as follows:
  - <Blank>—No response.
  - A—Accepted
  - R—Rejected
  - E—Accepted with errors
- Type—Type of document, such as PreInvoice before it is *split* into either of the other two Invoice types—Consolidated or Individual, as described in "Creating Invoices" on page 97. Blank indicates the ASN associated with a PreInvoice.
- Invoice Amount—Dollar amount of the Invoice

3 To view an Invoice or associated ASN, click that row in the list.

The document opens.

4 To view a related document, such as the ASN associated with the Invoice, or a Draft or Final version of an Individual or Consolidated Invoice split from the PreInvoice:

a Click the **+/-** icon at the left end of an Invoice row to display new rows of associated documents, such as split Invoices or the ASN.

Arrows point from the Invoice to the related documents. The **Type** column at right indicates the document type, such as PreInvoice of Individual Invoice. The ASN appears below the PreInvoice when a split Invoice is required.

| | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| ⊟ | | NORD | PINDINV001 | INVPO001 | 2010-10-13 | 1 | Final | 2010-10-12 17:20:40 | PreInvoice |
| → | | NORD | TESTPASNINDINV01 | | | 1 | Final | 2010-10-12 17:18:17 | |
| → | | NORD | INDINV001 | INVPO001 | 2010-10-13 | 1 | Final(Split) | 2010-10-12 22:08:32 | Individual |
| → | ★ | NORD | PINDINV001002 | INVPO001 | 2010-10-13 | 1 | Draft(Split) | 2010-10-12 17:20:42 | Individual |
| → | ★ | NORD | PINDINV001003 | INVPO001 | 2010-10-13 | 1 | Draft(Split) | 2010-10-12 17:20:42 | Individual |
| → | ★ | NORD | PINDINV001004 | INVPO001 | 2010-10-13 | 1 | Draft(Split) | 2010-10-12 17:20:43 | Individual |
| → | ★ | NORD | PINDINV001005 | INVPO001 | 2010-10-13 | 1 | Draft(Split) | 2010-10-12 17:20:44 | Individual |

b Click that row to open the document.

**Note:** For a description of PreInvoice and Individual and Consolidated "split" Invoices, see "Creating Invoices" on page 97.

# Creating Invoices

Use the information below to create Invoices. It varies slightly depending on your retailer's policy for Consolidated and Individual Invoices.

See:


- "Types of Invoices in Vendor Portal" on page 97
- "Invoice Process Overview" on page 97
- "Creating the PreInvoice" on page 98
- "Creating the Real Invoice" on page 102


## Types of Invoices in Vendor Portal

An *Individual Invoice* contains data for a specific Store, Mark For location, or Ship To destination such as a distribution center specified in the Purchase Order and associated ASN. The Invoice bills for goods separately by location—one Store or destination per PO per shipment.

A *Consolidated Invoice* contains data for a specific PO rather than for an individual Store or destination. The Invoice bills for goods separately by PO—one PO per shipment to one Ship To destination for multiple Stores or Mark For locations.

Most retailers support one of the following uses of Invoices:

- Only Individual Invoices
- Only Consolidated Invoices
- Both Consolidated and Individual Invoices

## Invoice Process Overview

The Invoice process in OpenText Vendor Portal includes the following basic stages:

1. In Vendor Portal create what the application calls a PreInvoice. It is your Invoice in progress before you generate a Consolidated or Individual Invoice(s) to send to the retailer. You cannot send or print a PreInvoice. It is only a workspace to create a real Invoice, unless the Note below applies.

   For details, see "To create the PreInvoice" on page 98.

   **Note:** If your trading community uses neither Consolidated nor Individual Invoices and creates Invoices directly from the PO, see "Creating the PreInvoice" on page 98 to create your Invoice. In this case, your trading community can save or send the so-called PreInvoice. You do not have to generate an Individual or Consolidated Invoice, so do not use "Creating the Real Invoice" on page 102. The PreInvoice is the real Invoice for your trading community.

2. After completing the PreInvoice, select whether to generate a Consolidated Invoice or Individual Invoice(s). Your choices vary based on your retailer. OpenText Vendor Portal calls this action "splitting" the PreInvoice.
3. For details, see "To create the real Invoice" on page 102.

   **Note:** OpenText Vendor Portal generates editable Invoice number(s) for Consolidated or Individual Invoices. See the procedure below for details.

4 Send the Consolidated or Individual Invoice(s) to your retailer. Do this at the end of the procedure for creating the real Invoice, or do it later.

Coordinate Invoice timing and requirements with your retailer. For example, your retailer might want you to send an Invoice either before or after actual shipment occurs.

## Creating the PreInvoice

**To create the PreInvoice**

1 Click the **Shipping** tab or **Finance** tab.

**Note:** If your trading community generates Invoices directly from Orders instead of from ASNs:

a Click the **Orders** tab, then the **Customer Orders** option in the **Navigation** panel.

b Click an Order to open it, then go to step 4. (The term PreInvoice is not relevant to your trading community, so you can ignore it in this procedure.)

2 Click the **Advance Ship Notices** option in the **Navigation** panel.

The **Advance Ship Notice** list page opens.

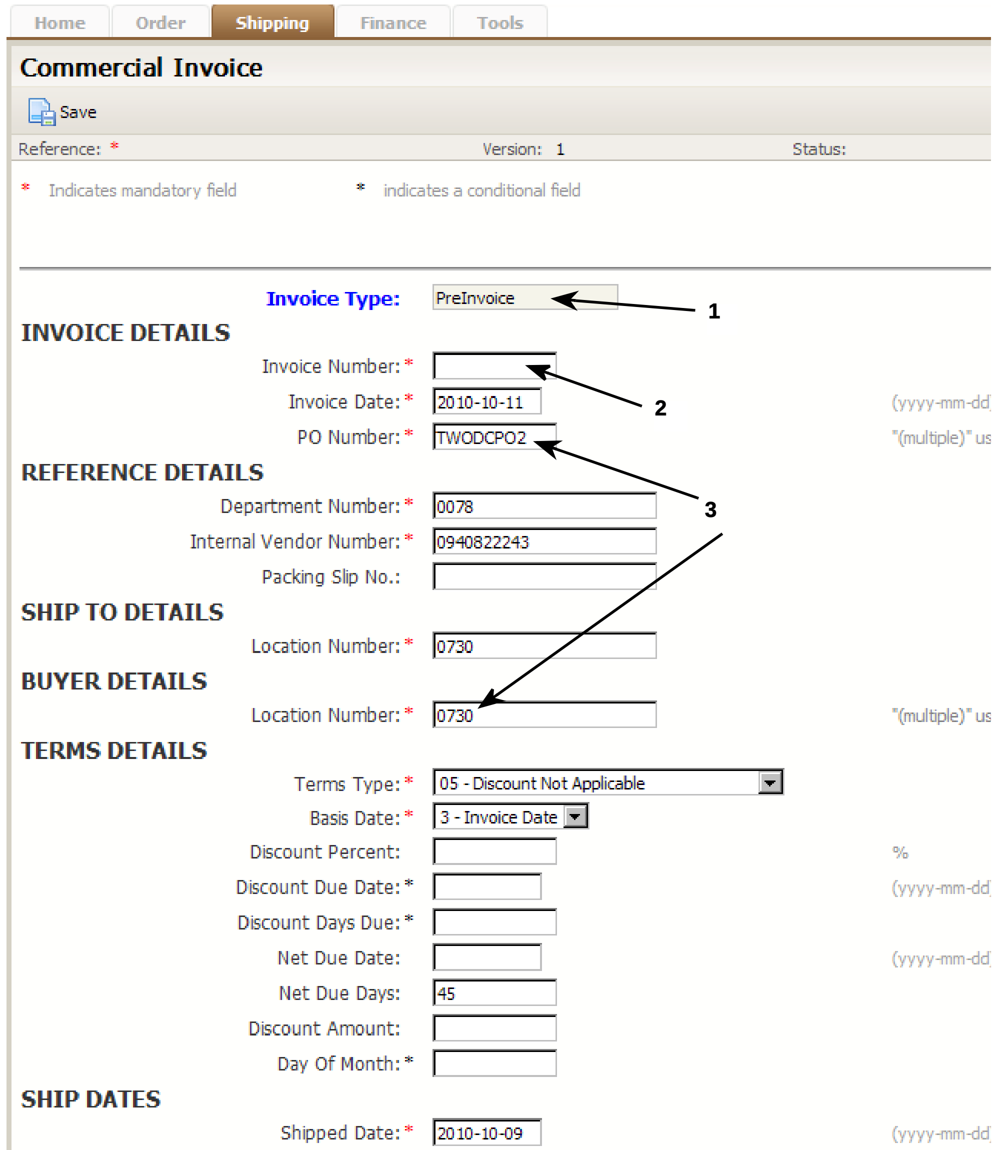
3 Click the row of the ASN you wish to Invoice. The ASN must be in Final status.

The ASN opens.

4 Click **Create Invoice**.

The **PreInvoice** form opens with a set of editable fields,. Some are prepopulated with data from the ASN.

**Important:** Vendor Portal uses data in the PreInvoice to automatically populate those fields in the real Invoices you will later generate from the PreInvoice. This saves time generating multiple real Invoices. For example, enter **Terms Details** data in the PreInvoice to not have to enter it in the real Invoices.




**1** When you first create an Invoice, the **Invoice Type** is PreInvoice.

**2** Unique temporary **Invoice Number** from which Vendor Portal will generate real Invoice numbers.

**3** **Multiple** in **PO Number** and **Location Number**, if applicable, indicates that the ASN has data for more than one PO. When you split this type of PreInvoice into a Consolidated or Individual Invoices, Vendor Portal prepopulates those two fields based on the retailer's guidelines.

**5** Enter data as needed.

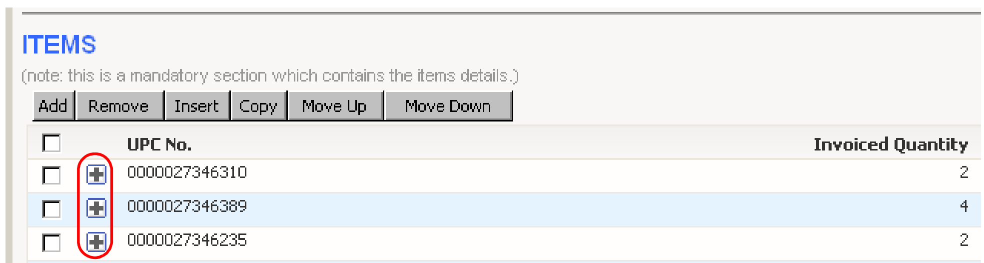
**Important:** You must enter data for all required fields in the PreInvoice. For details, see "Asterisks Indicating Required Fields in Document Forms" on page 15.

**Note:** Vendor Portal uses the **Invoice Number** field in the PreInvoice to generate Invoice Numbers for the real Invoices. You must enter a unique Invoice Number to use as a base from which to generate real Invoice numbers when you create Consolidated or Individual Invoices.

**6** Modify, if necessary, the **Items** section at the bottom of the **PreInvoice** form. Data columns vary by retailer.

**Note:** The Invoice should reflect the items sent on the ASN.

Possible actions are described below:




**a** To view or edit item details, click **+** in the carton row.

The row expands to display item data. Click **-** to hide the details.

**b** To add a item to the bottom of the list, click **Add**.

A new item row displays in expanded form after existing items.

**c** To remove an item from the list, click the check box in the item row to place a check mark in it, then click **Remove**.

The row is removed.

**d** To insert a item above an existing item in the list, click the check box in the existing item row to place a check mark in it, then click **Insert**.

A new item row displays in expanded form above the selected item.

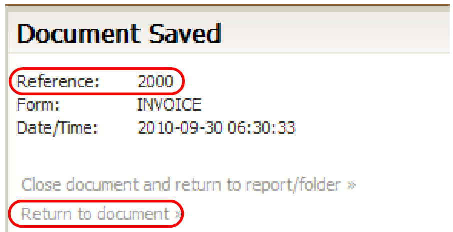
**e** To copy an existing item to a new row in the list, click the check box in the existing item row to place a check mark in it, then click **Copy**.

A new item row displays in expanded form below the selected item.

**f** To move a item up or down in the Items section, click the check box in the existing item row to place a check mark in it, then click **Move Up** or **Move Down** as needed.

**7** Click **Save** to save the PreInvoice.

The **Document Saved** page shows that the Invoice is saved and displays the Invoice Number from the PreInvoice as the **Reference** number.



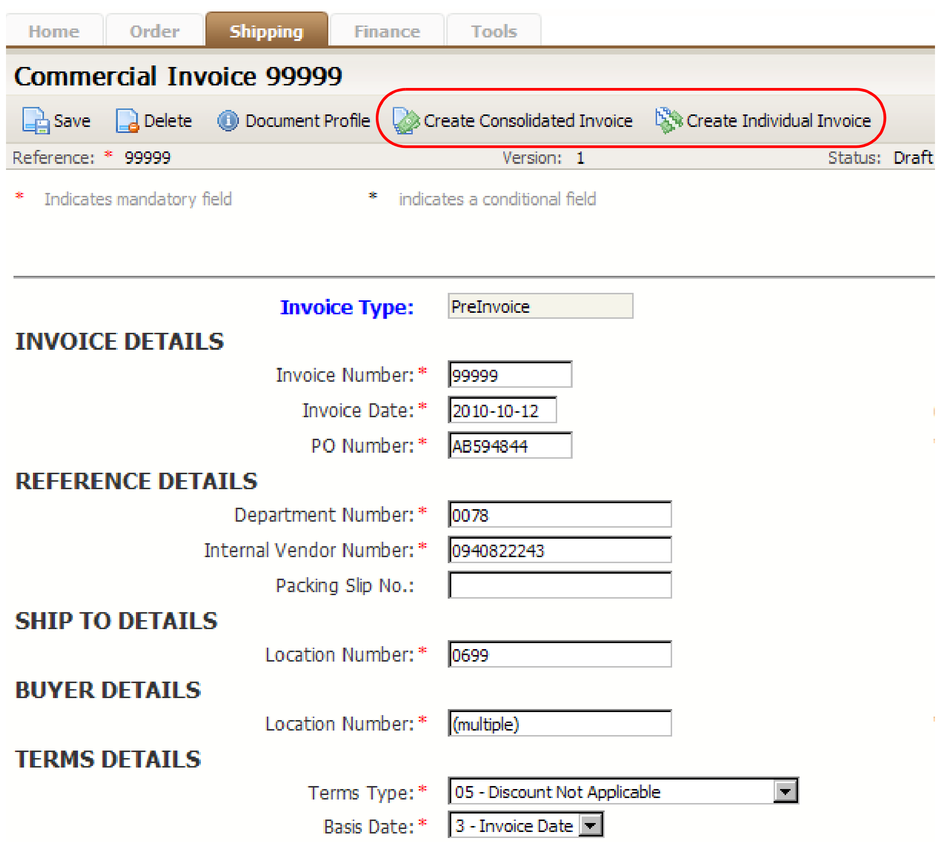

**Note:** If your trading community does not use Consolidated or Individual Invoices, and generates Invoices directly from a PO, do one of the following:

- To send the Invoice later, click **Save** to save the Invoice. The **Document Saved** page opens. Do not continue with this procedure.
- To send the Invoice now, click **Send**. The **Document Sent** page opens. Do not continue with this procedure.

8 Click the **Return to document** link.

The saved PreInvoice reopens. **Create** buttons display above the PreInvoice. Buttons vary by trading community.

**Note:** You can also open the PreInvoice from the **Invoices** page in the **Finance** tab. It lists the PreInvoice with Draft status and PreInvoice type.



9 You can now generate one or more real Invoices from the PreInvoice by using a **Create** button at the top of the page as described in "Creating the Real Invoice" on page 102.

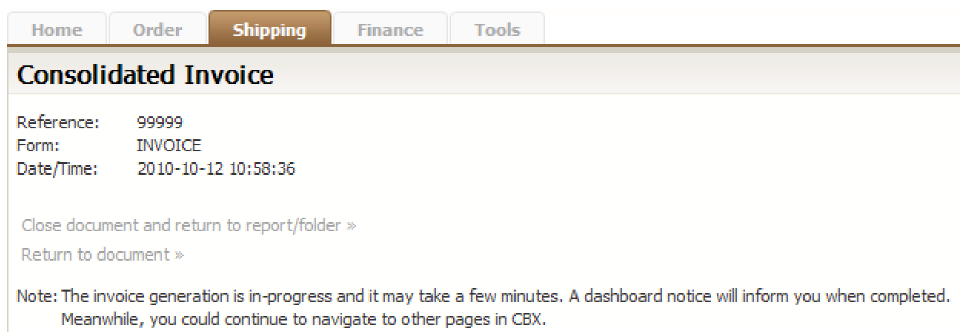
## Creating the Real Invoice

### To create the real Invoice

**Note:** Use this procedure only to create a Consolidated or Individual Invoice.

1 Depending on which option(s) is available in your trading relationship, click either **Create Individual Invoice** or **Create Consolidated Invoice.** (You may have the choice of either.)

The **Split Invoice** or **Consolidated Invoice** page displays, depending on your selection in the previous step.

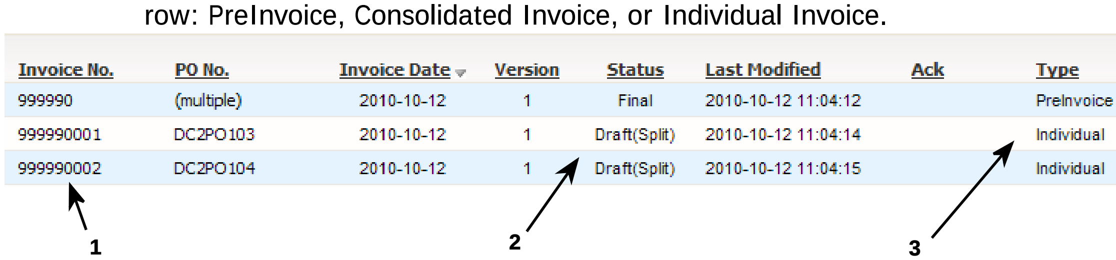



Vendor Portal splits the PreInvoice into one or more Consolidated or Individual Invoice(s) based on your selection and retailer guidelines. For large documents this may take several minutes. You can continue to perform other actions in the application, if you wish.

The real Invoice is a new document, so you cannot access it from the **Split Invoice** or **Consolidated Invoice** page above. You can only access the PreInvoice from that page.

2 Click the **Finance** tab, then click the **Invoices** option at left.

The **Invoices** list displays the PreInvoice in Final status and the split Invoice(s) in Draft (Split) status. The **Type** column indicates the type of Invoice in that row: PreInvoice, Consolidated Invoice, or Individual Invoice.



| Invoice No. | PO No. | Invoice Date | Version | Status | Last Modified | Ack | Type |
|---|---|---|---|---|---|---|---|
| 999990 | (multiple) | 2010-10-12 | 1 | Final | 2010-10-12 11:04:12 | | PreInvoice |
| 999990001 | DC2PO103 | 2010-10-12 | 1 | Draft(Split) | 2010-10-12 11:04:14 | | Individual |
| 999990002 | DC2PO104 | 2010-10-12 | 1 | Draft(Split) | 2010-10-12 11:04:15 | | Individual |



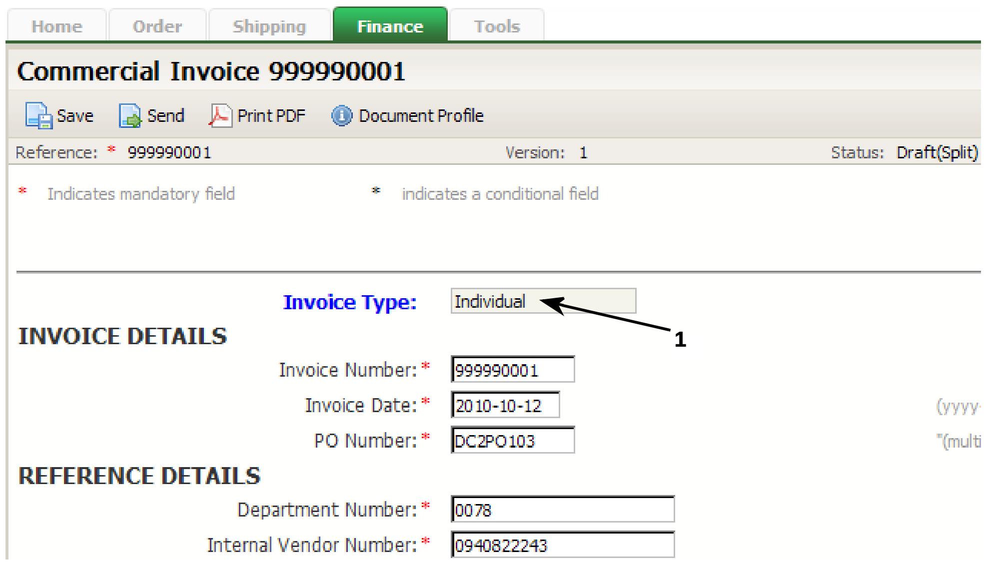
1 Vendor Portal automatically generates Invoice Numbers for Invoices split from a PreInvoice.

2 The **Status** column indicates the status of the Invoice and if the Invoice is split.

3 The **Type** column indicates the type of Invoice: PreInvoice, Consolidated, or Individual.

The split Invoices have Invoice Numbers generated by OpenText Vendor Portal, based on the PreInvoice Number. For each split Invoice, the application appends a 3-digit number to the PreInvoice Number. For example, in the screen shot below, Invoice TEST1 is split into Individual Invoices TEST1001, TEST1002, AND TEST1003. To change an auto-generated Invoice Number, open the Invoice and edit that field to a unique Invoice Number.

**3** To modify and/or send Invoices, click the row of a split Invoice—that is, an Invoice with Draft (Split) status. The Invoice appears.



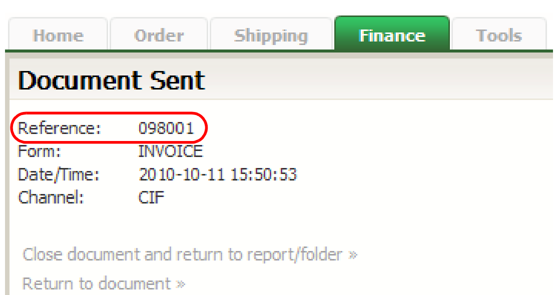

**1** The **Invoice Type** field indicates the type of split Invoice: Consolidated or Individual.

**4** Change the Invoice as needed. For example, work with Summary Allowance Charges.

To print the Invoice, click **Print PDF.**

**5** To send the Consolidated or Individual Invoice, with the Invoice open click **Send**.

The **Document Sent** page shows the Invoice is sent to your trading partner and displays the Invoice Number as the **Reference** number. The Invoice is added to the **Invoices** list page with Final (Split) status.




**6** To modify and/or send other split Invoices generated from the original PreInvoice:

**a** On the **Invoices** list page click the row of the split Invoice to open it.

b Change the Invoice as needed.

7 Click **Send**.

8 Repeat the last three steps as needed for other split Invoices.

# Amending Invoices

Use this procedure to amend (that is, edit) Invoices. For example, if you send an incorrect Invoice, you can amend the Invoice, and send the amended (corrected) Invoice.

You can amend an individual or Consolidated Invoice in Final status. This procedure changes the status to Draft status after you save the amended Invoice.

You can also amend a PreInvoice, but be aware that changes to the PreInvoice will apply to all Invoices you generate from the PreInvoice. Also remember that if you have already finalized an earlier split Invoice for this PreInvoice, Vendor Portal will list both the Finalized version *and* the new Draft versions generated from the amended PreInvoice.

### To amend an Invoice

1 Click the **Finance** tab.

2 Click the **Invoices** option in the **Navigation** panel.

The **Invoices** list page opens.

3 Click the row of an Invoice to open it.

4 Click **Amend**.

The page resets to make some fields editable.

5 Make changes as needed, using the actions described in "Creating Invoices" on page 97.

6 After editing, do either of the following:

- To save the Invoice but not send it to your trading partner at this time, click **Save**. The Invoice is added to the **Invoices** list page with Draft status.
- To send the Invoice to your trading partner, click **Send**. The Invoice is sent to your trading partner and added to the **Invoices** list page with Final status.
- To split an amended PreInvoice into a Consolidated or Individual Invoices, see "Creating the Real Invoice" on page 102.

# Deleting Invoices

Use this procedure to delete the following:

- PreInvoices in Draft status—that is, not yet split into a Consolidated or Individual Invoices.
- Other non-split Invoices in Draft status.

You cannot delete an individual or Consolidated Invoice even if it is in Draft status.

To change Final status to Draft status, see "Amending Invoices" on page 104.

**To delete an Invoice**

1 Click the **Finance** tab.

2 Click the **Invoices** option in the **Navigation** panel.

The **Invoices** list page opens.

3 Do one of the following:

- On the **Invoices** list page, click the check box in the row of each Invoice you want to delete, then click **Delete**.
- Click the row of an Invoice to open it, then click **Delete**.

A message asks if you want to delete the Invoice(s).

4 To delete click **Yes** in the message box.

# Printing Invoices

Use this procedure to print Invoices.

**To print an Invoice**

1 Click the **Finance** tab.

2 Click the **Invoices** option in the **Navigation** panel.

The **Invoices** list page opens.

3 Do one of the following:

- On the **Invoices** list page, click the check box in the row of the Invoices you want to print, then click **Print Document as PDF**.
- Click the row of an Invoice to open it, then click **Print PDF**.

The Invoice(s) prints to the assigned printer.

# Managing Documents

# 6

This chapter describes how to manage your documents in OpenText Vendor Portal by deleting and restoring documents and understanding Vendor Portal's document purging and archiving policy.

This chapter is organized as follows:



## Purging and Archiving Documents

The system archives documents that have been sent or received and not opened in more than 500 days. This means that the system removes the document from the application and stores it offline. To retrieve documents, contact customer support. See "Product Support and Assistance" on page 7.

The system purges documents that have *not* been sent or received and have not been opened in more than 200 days—for example, old documents in Draft status. This means the system automatically removes the document from the application and does not store it offline. The document cannot be retrieved.

To remove notices from the **Home** tab, you must manually delete them because the system does not purge them. See "Deleting Notices" on page 19.

## Deleting and Restoring Documents

Use the following procedures to restore deleted documents and to delete documents from OpenText Vendor Portal. Note that when you delete a document in the Order, Shipping, or other document module in Vendor Portal, the document goes to the Trash but remains in Vendor Portal. When you delete a document from the Trash folder, you delete it from OpenText Vendor Portal.

Procedures to delete documents from modules in OpenText Vendor Portal are described in the sections for each document type—for example, Orders, ASNs, and Invoices.

### Restoring Deleted Documents from Trash

You can restore documents that have been deleted to the **Trash** folder.

You cannot restore deleted notices or documents deleted from OpenText Vendor Portal.

### To restore deleted documents from the Trash

1. Click the **Home** tab.
2. Click the **Trash** option in the **Navigation** panel.

   The page resets to display deleted documents.
3. Click the check box next to each document you wish to restore to place a check mark in it.
4. Click **Restore**.

   The document is restored to its former location.

## Deleting Documents from OpenText Vendor Portal

To delete documents from OpenText Vendor Portal, delete them from the **Trash** folder.

**Important:** You cannot restore documents that you delete from the **Trash** folder.

### To delete documents from the system

1. Click the **Home** tab.
2. Click the **Trash** option in the **Navigation** panel.

   The page resets to display deleted documents.
3. Do either of the following:
   - Click the check box next to each document you wish to restore to place a check mark in it, then click **Delete**.
   - To delete all of the documents, click **Empty Trash**.

# Tools

# 7

This chapter describes how to work with several tools in OpenText Vendor Portal: your profile, contacts, and the transaction log. They are located in the **Tools** tab.

This chapter is organized as follows:



To work with carton settings, see "Working with Saved Carton Settings" on page 65.

## Working with Your Profile

Maintain your personal settings such as password in the **Profile** section. The **Profile** section displays user profile and related information.

You can change the following personal profile data on the **Profile** page:

- Password

  If you have forgotten your password, see "Resetting a Forgotten Password" on page 11.

- Default display language
- Default time zone of your location

**Important:** The **Profile** page also displays your GS1 Company Prefix (also called Block ID) in the Company Information section. It is the component of your UCC-128 label that uniquely identifies your company. You cannot edit the Company Prefix in OpenText Vendor Portal. However, if the prefix is incorrect, contact Cloud Support Services to have it corrected. See "Product Support and Assistance" on page 7

### To view or change your password or profile

1. Click the **Tools** tab.
2. Click the **Profile** option in the **Navigation** panel.

   The **Profile** page opens.

3. Edit your profile data as needed.

To change your password, type the new password in both the **Password** and **Confirm Password** fields to confirm. The new password will take effect the next time you log in.

Note the following about passwords:

- Passwords do not expire.
- Passwords must contains at least six letters (upper and/or lower case), numerals (0-9), or other characters available on a standard U.S. keyboard (for example, #, $, and %).
- Passwords in OpenText Vendor Portal are case-sensitive.
- Contact your system administrator for password requirements in your organization.

# Working with Contacts

The **Contacts** list page displays the names, addresses, and telephone numbers of your contacts. You can add, remove, and search for contacts on this page.

You can create the following types of contacts in OpenText Vendor Portal:

- Private contacts accessible only by you.
- Shared contacts accessible by all users in your organization.

Use the following procedures to work with your contacts:

- “Viewing Your Contacts” on page 110
- “Creating Contacts” on page 111
- “Editing Contacts” on page 112
- “Deleting Contacts” on page 112

## Viewing Your Contacts

**To view your contacts**

1. Click the **Tools** tab.
2. Click the **Contacts** option in the **Navigation** panel.

   The **Contacts** page lists the name, physical address, and telephone number of your existing contacts, both private and shared.

   The page lists all shared contacts created by other users in your organization. It does not list private contacts created by other users in your organization.
3. To view other information for a contact, such as email address, click the contact row to open the contact record.
4. If you have a long list of contacts, to quickly find the contact you want to view, use either of the following search techniques:
   - To search for a specific contact, in the **Search** field above the list, type any series of characters in the beginning, middle, or end of the name, address, or telephone number, then click **Search**.

The list resets to display only contacts that contain the sequence of characters in the **Search** field.

- To display only contacts with names that begin with a specific letter, click that letter in the alphabet listed on the **Search** bar above the list. Make sure the **Search** field is blank unless you want to limit the list to contacts that contain the sequence of characters in the **Search** field.

  The list resets to display only contacts that begin with that letter and contain the sequence of characters, if any, in the **Search** field.

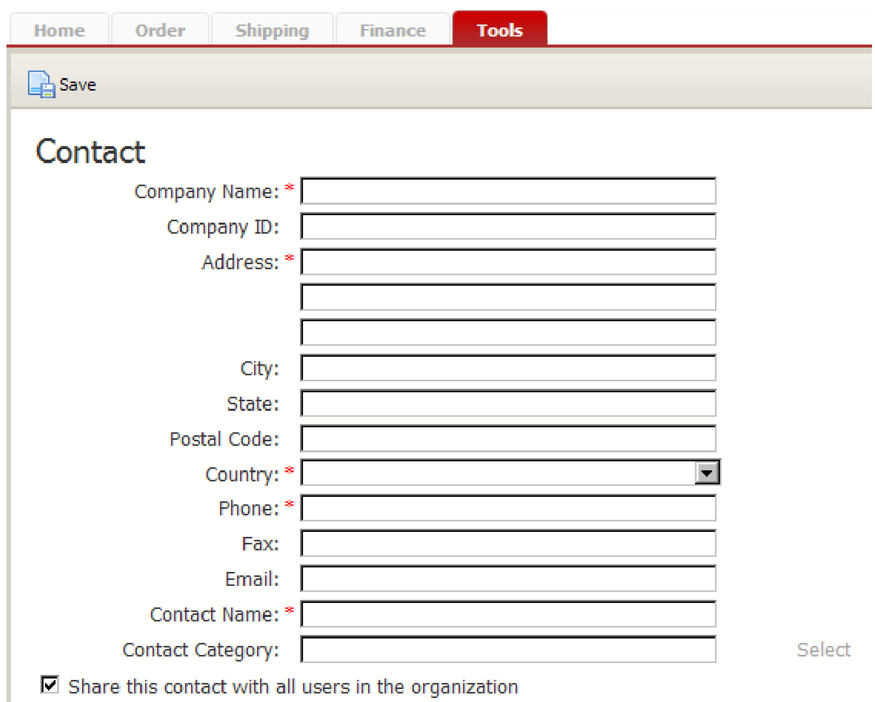
## Creating Contacts

**To create a contact**

1. Click the **Tools** tab.
2. Click the **Contacts** option in the **Navigation** panel.

   The **Contacts** list page opens.
3. Click **Add**.

   The **Contact** form opens.




   Type the company, address, and other contact information you wish to enter.

   **Note:** A red asterisk (*) indicates that the field is required.
4. To allow other people in your organization to view this contact, leave the **Share this contact with all users in the organization** check mark in the check box at the bottom of the page. To not share the contact, click the check box to remove the check mark.
5. Click **Save**.

   The contact is added to your list.

## Editing Contacts

**To edit a contact**

1. Click the **Tools** tab.
2. Click the **Contacts** option in the **Navigation** panel.

   The **Contacts** list page opens.
3. Find the contact as described in "To view your contacts" on page 110.
4. Click the check box in the contact row to play a place mark in it, then click **Edit**.

   The contact record opens for editing.
5. Edit the contact as needed,

   Type the company, address, and other contact information you wish to enter.

   **Note:** A red asterisk (*) indicates that the field is required.

   To allow other people in your organization to view this contact, click the **Share this contact with all users in the organization** check box at the bottom of the page to either add a check mark to share the contact, or remove a check mark to not share the contact.
6. Click **Save**.

   The **Contacts** list is updated with the edited contact record.

## Deleting Contacts

**To delete a contact**

1. Click the **Tools** tab.
2. Click the **Contacts** option in the **Navigation** panel.

   The **Contacts** list page opens.
3. Find the contact as described in "To view your contacts" on page 110.
4. Click the check box in the contact row to play a place mark in it, then click **Delete**.

   The contact is removed from your **Contacts** list.

# Changing the Maximum Number of Rows that Display

Use this procedure to change the maximum number of rows that display in a list in OpenText Vendor Portal.

A Vendor Portal screen by default displays a maximum of 25 Orders, ASNs, items, or other types of records in a list. For some actions, however, you might want to display more, or all, records in a list—for example, to pack all items into a single carton in one action.

You can set the maximum number of records up to 999.

**Note:** The default number of records applies to all list screens in OpenText Vendor Portal.

#### To change the number of records that display in a list

1. Click the **Tools** tab, then click the **Profile** option.

   The **Profile** page opens.

2. In the **Company Information** section, in the **Max. Records per Page** field, type the maximum number of records (that is, rows) to display on Vendor Portal list screens.

   To use the system default value of 25, leave the field blank.

3. Click **Save**.

# Working with the Transaction Log

The **Transaction Log** lists all inbound and outbound documents that your user login has viewed or worked with in OpenText Vendor Portal, and Functional Acknowledgement (997) documents automatically sent in response to inbound documents from your trading partner.

The list includes for each document such information as the date and time processing occurred, current status, document type, and document identifier.

See:

- "Viewing Your Transaction Log" on page 113
- "Exporting Your Transaction Log" on page 113

## Viewing Your Transaction Log

#### To view your transaction log

1. Click **Tools**.
2. Click the **Transaction Log** option in the **Navigation** panel.

   The **Transaction Log** page displays. No data is listed yet.

3. In the **Processed From** and **To** fields enter beginning and end dates to specify a time range. Either type the dates, or click the **From** and **To** links and select dates in the calendar functions.
4. Click **Search**.

   The list resets to show only documents processed during that time range.

## Exporting Your Transaction Log

#### To export your transaction log

1. Click **Tools**.
2. Click the **Transaction Log** option in the **Navigation** panel.

   The **Transaction Log** page displays. No data is listed yet.

3. In the **Processed From** and **To** fields enter beginning and end dates to specify a time range. Either type the dates, or click the **From** and **To** links and select dates in the calendar functions.
4. Click **Search**.

The list resets to show only documents processed during that time range.

5 Click **Export**.

The log exports as a CSV file.

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